- Click on the arrow buttons to copy any contact information from the duplicated client record (on the right) into the main one that you will be keeping (on the left)
- You may also type new information into any of the fields on the main client record on the left
- Click Next when you are satisfied with the contact information
- Click on the arrow buttons to copy any of the detail information from the duplicated client record (on the right) into the main one that you will be keeping (on the left)
- You may also select new information on any of the fields on the main client record on the left
- Click the Finish button when you are satisfied with the detail information and Insight will move any history information for the duplicated record to the main one and then delete the duplicated record
- Click the Cancel button when you are finished merging clients

Merge Duplicated Clients Reference

Active Lookup

The Active Lookup area in the left area of the screen contains the list of clients that Insight has determined may have a duplicate. Please refer to the "Active Lookups" section on page 1 to learn how this feature is designed to be used.

Contact and Details Screens

These screens contain all of the contact and detail information for the two clients being compared. The New Client on the left is the "master" client – the one that will be kept. The Old Client on the right will be deleted after the merge is complete. Copy any relevant information from the client on the right to the client on the left to make sure the one on the left has the most up to date information. You can type into the fields for the client on the left, or click on the arrow buttons to copy information over from the client on the right.

Function Keys and Buttons

The function buttons in the bottom right section of the screen allow you to perform the most common tasks for this screen. Most of the function buttons have an F-key associated with them that you can press on your keyboard instead of clicking the button with your mouse.

Merge

Clicking this button will start the process of merging the selected clients.

Not a Duplicate

Clicking this button will remove the selected client from the list of possible duplicates.

Copy All

Clicking this button will copy all of the information shown on screen from the client on the right to the client on the left.

Previous (F4)

If you have not yet started the merge process on the selected client, clicking Previous Client will select the client in the Active Lookup that is above the one that you are currently on. If you are in the process of merging two clients, the button will read Previous Screen, and will take you back from the details screen to the contact screen.

Next (F5)

If you have not yet started the merge process on the selected client, clicking Next Client will select the client in the Active Lookup that is below the one that you are currently on. If you are in the process of merging two clients, the button will read Next Screen if you are on the contact screen or Finish if you are on the details screen. It will take you from the contact to the details screen, and once you are on the details screen, it will complete the merge process.

Cancel (F9)

If you have not yet started the merge process on the selected client, clicking this button will close the Client Merge screen. If you are in the process of merging two clients, clicking Cancel will stop the merge process and return control to the list of clients on the left.

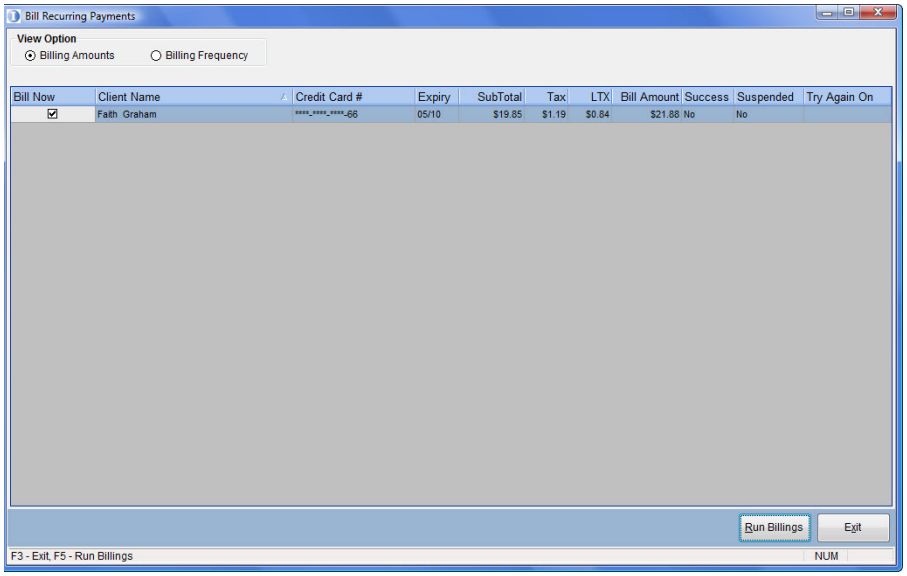
Bill Recurring Payments

This is a feature allows you to process all of your pending recurring billing payments from one screen.

How to Process Payments

- Click on the Utilities button on the Insight Menu Bar

- Click on Bill Recurring Payments in the menu
- All of the Recurring Billings that need to be processed will appear on the screen
- If there are any clients displayed that you do not want to bill at this time, click in the Bill Now column for them to remove the checkmark



- Click on the Run Billings button and Insight will attempt to process each transaction
- Each successful transaction will receive a check mark in the Success column
- For any unsuccessful transactions, you can click Retry Now to attempt to process the billing a second time or click Set Retry Date to specify the next date that the selected transaction should be attempted a second time
- Click the Close button when you are finished

Bill Recurring Payments Reference

Recurring Payments grid

This grid contains all of the credit card transactions that were processed since the last time your account was settled.

View Option

You can use this option to switch between viewing the billing amount and taxes and viewing the billing frequency and last billed date.

Function Buttons

The function buttons in the bottom right section of the screen allow you to perform the most common tasks for this screen.

Run Billings

When you click this button, Insight will attempt to process all of the recurring payments listed in the grid.

Retry Now

Clicking this button will attempt to process the selected recurring payment a second time.

Set Retry Date

Click this button to select a date on which to attempt to retry an unsuccessful billing. This option is useful if you have contacted a client about a billing that was unable to be processed, and they need a few days to make a payment on their credit card before you can try again.

Suspend / Unsuspend

Clicking this button will suspend or resume the regular billing for the selected recurring payment. A suspended payment will not be processed again until it is Unsuspended.

Close

Clicking this button will close the Bill Recurring Payments screen.

Check Text / SMS Account Balance

If you are using the SMS messaging feature through Insight, you can use this utility to check the remaining balance of your SMS credits.

Send Backup

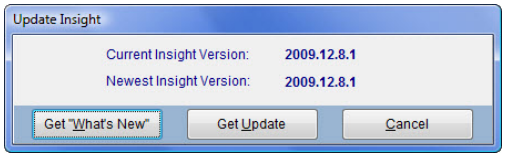
This is a feature we have included to make it easier for our customers to send us a backup if necessary. This should only be done at the request of an Insight technical support representative. When you use this feature, Insight will create a backup of your data and send it to Syntec's internet site automatically. You must be connected to the internet for this to work.

Check for Updates

This is a feature we have included to make it easier for our customers to keep their copy of Insight up to date. When you use this feature, Insight will automatically connect to Syntec's internet site and download the latest update. You must be connected to the internet for this to work.

How to Update

- Click on the Utilities button on the Insight Menu Bar
- Click on Check for Updates in the menu
- Insight will display a window showing your current version as well as the newest version available for download



- If your version of Insight is older than the available update, you can click on the Get Update button and Insight will automatically download the new version
- When the progress bar for the download reaches 100%, click the Close button
- Please read the next message Insight gives you very carefully, click the OK button, and exit from Insight
- You should be able to see a new icon appear on your desktop for the file that Insight has downloaded called InsightUpdate.exe
- Double click on the InsightUpdate.exe icon
- The Insight setup program will run and tell you what version of Insight is about to be installed on your computer
- Click the Next button
- Insight will show you where on your computer it is going to install the Insight update to (you should not need to change this)
- Click the Install button
- Wait for all of the files to be installed and click Finish when it is done
  - If you receive any error messages during this time, it is probably due to Insight still running on your computer (or on another computer if you are on a network)
  - Make sure that you have exited from Insight on all computers and go back to the step of double clicking the InsightUpdate.exe icon
- Run Insight again and it will update and reindex your files for you

How to See What is New in the Latest Update

Method One

- Click on the Utilities button on the Insight Menu Bar
- Click on Check for Updates in the menu
- Insight will display a window showing your current version as well as the newest version available for download
- Click on the Get "What's New" button

- Insight will open up the version history document in Adobe Acrobat Reader
- Click the ‘x’ button when you are done reading the document
- Click the Cancel button on the Update Insight window

Method Two

- Click on the Help button on the Insight Menu Bar
- Click on the What’s New? button
- Insight will open up the version history document in Adobe Acrobat Reader
- Click the ‘x’ button when you are done reading the document
- Click the OK button on the Insight Help window

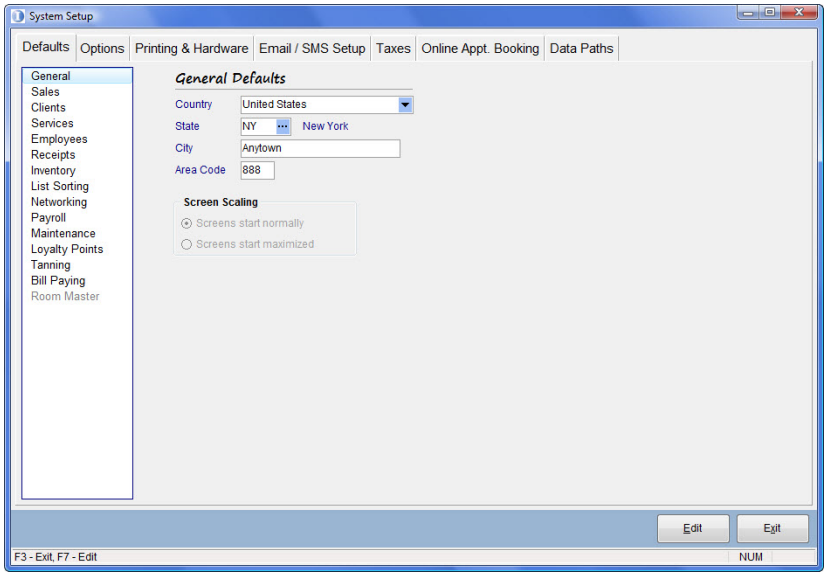
15. Setup

System Setup

How to Set Up Insight

- Click on the Setup button on the Insight Menu Bar
- Click on System Setup in the menu
- Click the Edit button or press F7 on your keyboard
- Click on each tab page in order to set up each of the areas listed below

NOTE: For detailed information about what the fields on these screens are to be used for, please see the "System Setup Reference" section on page 255.



Defaults Tab

- Click on each item in the list on the left in order to set up each of the areas
- Enter the appropriate information into the available fields
- Use the Lookup buttons where available to select information from lists
- Use your mouse to click on checkboxes or select from multiple choice options

Options Tab

- Click on each item in the list on the left in order to set up each of the areas
- Click on each Feature Description in the list to read the Feature Details on the right
- Click the checkboxes to turn on the features that you wish to enable

Printing and Hardware Tab

- Click on each item in the list on the left in order to set up each of the areas
- Enter the appropriate information into the available fields
- Use the Lookup buttons where available to select information from lists
- Use your mouse to click on checkboxes or select from multiple choice options

Email Setup Tab

- Click on each item in the list on the left in order to set up each of the areas
- Enter the appropriate information into the available fields
- Use your mouse to click on checkboxes for options that need to be enabled

Taxes Tab

- Enter the appropriate information into the available fields
- Use your mouse to click on checkboxes for options that need to be enabled

Data Paths Tab

> ***NOTE: You should not need to change these fields. Please do not change them unless instructed by an Insight technical support representative.***

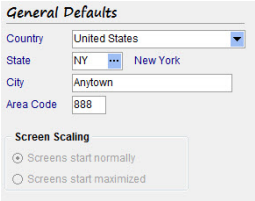
Credit Card Integration Tab

- Enter the appropriate information into the available fields
- Use the Lookup buttons where available to select information from lists
- Use your mouse to click on checkboxes for options that need to be enabled

- Click the Save button or press F3 on your keyboard when you are finished setting everything up

System Setup Reference

Defaults Tab

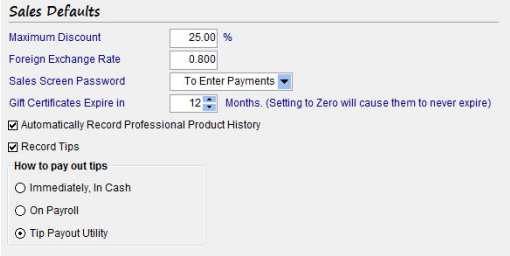


General

These are address fields that will be used as defaults that fill in automatically when you add new clients, employees, and vendors into Insight.

> ***NOTE: The second field will be named according to the country you select and may be something like State, Province, County, Region, District, etc.***

Sales



Maximum Discount

This is the highest percentage discount that can be given on the Sales screen. If an employee tries to discount more than this, they will receive a message telling them they cannot discount beyond this percentage. This can only be overridden if you have chosen to enable the "Require Password for Discounting" option on the Options tab. In that case, discounting will be restricted for all users except for anyone using the master password.

Foreign Exchange Rate

This field is for the default exchange rate for the most common foreign currency that you receive at your business. You will still have the opportunity to change the exchange rate in the Sales screen, but it will be much simpler for your staff if you just update the rate here once every day or week.

Sales Screen Password

This option determines when and if your employees are prompted to enter their password on the Sales screen. If you choose "Not Required", no password will be needed to enter the Sales screen and complete a sale. If you choose "To Enter Sales" a password is required before you can get into the Sales screen at all. If you choose "To Enter Payments", employees can enter the Sales screen and start a new sale. They will only be required to enter a password to record payment information and finish the sale.

> ***TIP: We recommend using the "To Enter Payment" option as this is usually the last step before completing the transaction and does involve the handling of cash. Insight will then keep track of which employee completed each transaction for security purposes.***

Gift Certificates Expire in

This field is used to specify the amount of time in months that a gift certificate is valid for by default. You can override this value at the time of selling a gift certificate. If you do not wish your gift certificates to have an expiry date, set this field to zero.

> ***NOTE: It is not legal in many areas to expire a gift certificate, so Insight always allows you to redeem a gift certificate even if it is beyond the expiry date, although it will give you a warning message.***

Automatically Record Professional Product History

This field is used to indicate if Insight should automatically record the professional products used up in providing the services into the Service History area of the Client screen. If there is a check mark in this field, Insight will add a history entry and list all of the professional products used (as they were specified on the Sales screen) for each service that the client received that day.

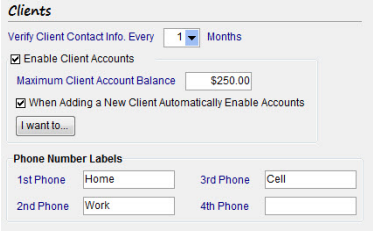
Record Tips

This checkbox is used to indicate if Insight should ask for the amount of the tip after the completion of each sales transaction. If this field has a check mark in it, Insight will record all of the tips information for each employee.

How to pay out tips

These options allow you to specify when tips are paid out to your employees. The options are "Immediately, In Cash", "On Payroll", and "Tip Payout Utility". The first option will automatically subtract the tip amount, in cash, from the cash drawer, and this will show up on your cash out reports at the end of the day. The "On Payroll" option assumes that all tips remain in the cash drawer and then adds the total tip amount onto the employee's payroll each period. This method is the best for ensuring that your employees are paying income tax on their tips. The Tip Payout Utility can be used if you keep all the tips in the cash drawer, but then periodically pay them out in lump sums, but at different times than you run payroll, for instance, every Friday.

Clients



Verify Client Contact Info. Every

This setting determines how frequently the Client Verification window will pop up when selecting a client on the Appointment Book or Sales screen. Using this feature is a good way to keep your employees accountable for maintaining accurate client address and/or phone number information.

Enable Client Accounts

Check off this field if you will allow clients to pay for items "On Account" in your business. Insight will keep a running balance for each client, and payments on their account can be made at any time through the Sales screen.

Maximum Client Account Balance

This field is the maximum amount that a client can have on their account balance at any time.

When Adding a New Client Automatically Enable Accounts

If this field is checked off, then when you add a new client, the Enable Account checkbox on the Details tab of the Client screen will automatically be checked of as well, allowing the new client to have an account balance with your business.

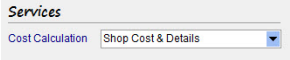
I want to… button

This button gives you two options, “Enable Accounts for all clients”, and “Disable Accounts for all clients”. These options will cause Insight to go through your entire client list and enable or disable, respectively, the accounts feature for all of them. This can save you a lot of time if you are changing the Enable Client Accounts setting on this screen and wish to have it update all of your clients immediately.

Phone Number Labels

These fields allow you to change the names of each of the phone number fields that appear on the Clients screen. In this way, you can help to make sure that numbers are entered consistently, by giving them names such as “Home Phone”, “Work Phone”, etc. This also saves you from having to enter “home” and “work” into the phone number extension fields each time you add a new client.

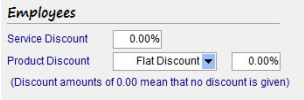
Services



Cost Calculation

This option is used to tell Insight how the cost of a service should be calculated. The valid options are “Shop Cost”, “Shop Cost & Details”, or “Professional Details Only”. If you choose the “Shop Cost” option, Insight will copy the value in the Shop Cost field on the Services screen as the cost for each service provided. If you choose the “Professional Details Only” option, Insight will calculate the cost for each service based on the professional products that were used up (and entered in the Sales screen) in providing the service. If you choose the “Shop Cost & Details” option, Insight will add the Shop Cost value to the cost of all the professional products used up to arrive at the cost for the service.

Employees



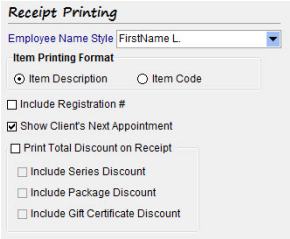
Service Discount

Here you can enter the default discount that employees receive when purchasing services from your business.

Product Discount

Here you can enter the default discount that employees receive when purchasing products from your business. This can be set as either a flat discount percentage, or as a percentage that is charged over and above the cost of the product.

Receipts



Employee Name Style

Here you can select how you would like employee names to appear on printed receipts.

Item Printing Format

This option allows you to specify whether the Item Description or Item Code is printed on your receipts.

Include Registration

If this box is checked, then the Reg. # from the Employees screen will be printed on receipts.

Show Client’s Next Appointment

If this box is checked, then the client’s next appointment (if booked) will be printed on receipts.

Print Total Discount on Receipt

This option will cause a line to print on your receipts for the total discount that was received on the sale. You can also choose to include the discount total for Series, Packages, and Gift Certificates once you have turned this option on.

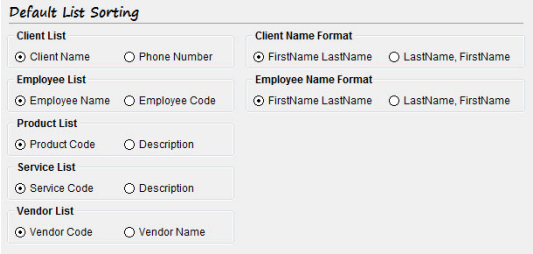
Inventory

Foreign Exchange Rate on Purchase Orders

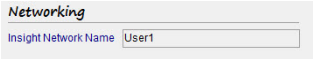
This field is for the default exchange rate for the most common foreign currency that you are billed in when ordering products for your business.

List Sorting

The options on this screen control how the Active Lookups and other lookup screens are sorted for the respective list types. You can always change the sort order when you are in a lookup, but they will default to the way they are set on this screen. You can also specify if client and employee names are shown in FirstName LastName or LastName, FirstName format.



Networking



Insight Networking Name

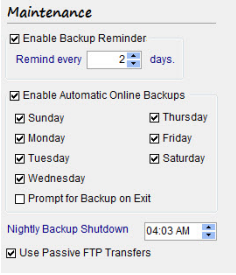
This is the name assigned to this computer. A network is a group of computers all connected together. Each computer on the network must have a different name. This is important for the Appointment Book to be able to refresh its screen properly, as well as other things.

Payroll

Separate County Tax

Checking this option will make the county tax appear separately from the state tax in the Payroll area. Arizona, Maryland, and Indiana should NOT select this option.

Maintenance



Enable Backup Reminders

Checking this option turns on the backup reminder feature in Insight. If you have not done a backup in the number of days specified below, Insight will pop up a message when you start it telling you that you need to do a backup as soon as possible to avoid losing too much information in the event of a computer failure, fire, or theft.

Remind Every

This field is the number of days to wait before starting to pop up the backup reminder notice from the last time a backup was completed.

Enable Automatic Online Backup

Checking this option turns on the automatic online backup feature in Insight. This option must be purchased separately and activated by Syntec before you will be able to enable and use it. Once enabled, you can check off each day of the week that you would like a backup to be done automatically, and Insight will do it at the time specified by the Nightly Backup Shutdown time.

Prompt for Backup on Exit

If this option is checked off, Insight will prompt you to perform a backup when you click the Exit button on the main Insight menu.

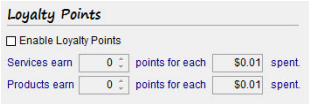
Nightly System (Backup) Shutdown

This is the time each day when Insight will close all screens and exit automatically. This is done to allow system maintenance functions such as online backups to be able to complete successfully without interference from a running copy of Insight. This cannot be turned off and it is highly recommended to leave this time set for some time between midnight and 5am to avoid having Insight shut down while your business is still open.

Use Passive FTP Transfer

This option controls the type of ftp transfer that Insight will use when getting updates or sending backups. If you have problems with either of those things, try changing the setting of this field.

Loyalty Points



Enable Loyalty Points

Checking this field will turn on the loyalty points system in Insight. With this you will be able to reward your loyal clients by allowing them to earn loyalty points and redeem them for products or services. You can redeem loyalty points from the payment area of the sales screen by selecting the Other paytype and selecting Loyalty Points from the menu.

Services earn …

Use these fields to specify how many loyalty points are earned per amount spent on services.

Products earn …

Use these fields to specify how many loyalty points are earned per amount spent on products.

Tanning

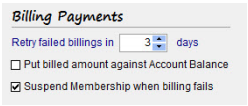
Enable Tanning Features

Checking this field will turn on the tanning related features in Insight. We made this an option to simplify Insight for businesses that do not do any tanning services.

Set Tanning as Primary Emphasis

If you have an actual tanning salon, where the primary function of your business is providing tanning services, you should turn the checkmark for this field on. This will reduce the number of choices you need to make in certain areas of Insight so that you are at maximum efficiency.

Bill Paying


Billing Payments
Retry failed billings in 3 days
Put billed amount against Account Balance
Suspend Membership when billing fails

Retry failed billings in

This field is the number of days to wait before automatically placing an unsuccessful recurring payment back on the payment list to be attempted again. This gives the client some time to make a payment on their credit card if the reason for the failure was that the card was declined.

Put billed amount against Account Balance

If this option is selected, then recurring billings will be put on the client's account instead of being run on a credit card.

Suspend Membership when billing fails

If this option is selected, then a client's membership will be put on hold if the recurring billing is unable to be processed.

Room Master

Enable RoomMaster Integration

Checking this field will turn on the RoomMaster integration feature in Insight. With this you will be able to interface to the InnQuest software to allow you to charge a room as a paytype.

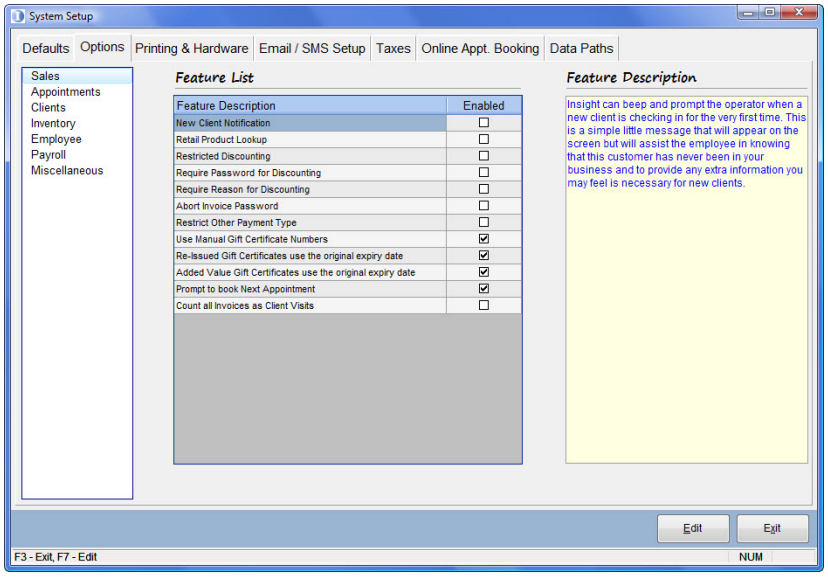
IP

This is for the IP address of the computer that is running the EPI interface of InnQuest.

Port

This is for the Port used by the computer that is running the EPI interface of InnQuest.

Options Tab


System Setup
Defaults
Options
Printing & Hardware
Email / SMS Setup
Taxes
Online Appt. Booking
Data Paths
Sales
Appointments
Clients
Inventory
Employee
Payroll
Miscellaneous
Feature List
Feature Description
Enabled
New Client Notification
Retail Product Lookup
Restricted Discounting
Require Password for Discounting
Require Reason for Discounting
Abort Invoice Password
Restrict Other Payment Type
Use Manual Gift Certificate Numbers
Re-Issued Gift Certificates use the original expiry date
Added Value Gift Certificates use the original expiry date
Prompt to book Next Appointment
Count all Invoices as Client Visits
Insight can beep and prompt the operator when a new client is checking in for the very first time. This is a simple little message that will appear on the screen but will assist the employee in knowing that this customer has never been in your business and to provide any extra information you may feel is necessary for new clients.
Edit
Exit
F3 - Exit, F7 - Edit
NUM

The description for each of the options in this area explains how Insight will behave if the option is turned on. These descriptions also appear directly on the screen in Insight for each option. To turn an option on, click the Enabled checkbox to put a checkmark in it.

Sales

New Client Notification

Insight can beep and prompt the operator when a new client is checking in for the very first time. This is a simple little message that will appear on the screen but will assist the employee in knowing that this customer has never been in your business and to provide any extra information you may feel is necessary for new clients.

Retail Product Lookup

Setting this option will make Insight bring up the Products Active Lookup first when using the lookup in the item code. By default, the list of services is displayed first.

Restricted Discounting

If this option is set up, you will only be able to reduce the selling price of an item as low as the current cost for that product. For services, the discount may only be as much as fifty percent. This option overrides any Maximum Discount % on the Defaults page that would result in being able to give more of a discount.

Require Password for Discounting

By default, Insight will allow any employee to give a discount on the price of a product or service. Enabling this option will require that the employee enter their password upon lowering the price of an item. Insight will then check to see if the employee has been given access to give a discount. The access level for this is set up in the Access Levels area found in the Employee section.

Require Reason for Discounting

By default, Insight will allow any employee to give a discount on the price of a product or service without requiring them to provide a reason for doing so. Enabling this option will require that the employee enter a reason upon lowering the price of an item.

Abort Invoice Password

You can set up Insight to require a password when an invoice is aborted. If this option is set up, when a sales transaction is cancelled, the user will have to enter their password (for identification only) and type a reason why the transaction is being aborted. All of this information will now be displayed in an Aborted Invoices report available by clicking Reports -> Sales Reports -> Management.

Restrict Other Payment Type

With this option you can disable the use of the Other payment type button except for the master password.

Use Manual Gift Certificate Numbers

This option will allow you to specify your own gift certificate serial numbers. Normally, Insight will automatically assign sequential numbers for gift certificate sales. Using this option, you will have to enter the serial number for the gift certificate when it is being sold.

Re-Issued Gift Certificates use the original expiry date

If this option is selected then gift certificates will retain their original expiry date when being reissued to a new number.

Added Value Gift Certificates use the original expiry date

If this option is selected then gift certificates will retain their original expiry date when having value added on to them.

Prompt to book Next Appointment

This option will cause Insight to pop up a prompt at the end of a sales transaction to book the client's next appointment, if they do not already have one.

Count all Invoices as Client Visits

If this option is enabled, Insight will record a visit for client when they are on any invoice. Normally visits are only recorded when a client purchases a service.

Appointments

Client First on Appointment Booking

Currently Insight is set up to show the service that is being booked on the first line of the appointment and the name of the client appears on the second line of that appointment. Some businesses who do a lot of 15 minute appointments never get to see the name of the client displayed on the appointment screen. You have the option to have the first line of an appointment be the client name as opposed to the service code. Please note that this will not affect appointments that were booked prior to setting this option up.

Require Reason for Moving

Enable this option if you want to require that a reason be given for an employee to move an appointment. Insight automatically records every time an appointment is moved whether or not this option is turned on.

Require Reason for Deleting

Enable this option if you want to require that a reason be given for an employee to delete an appointment. Insight automatically records every time an appointment is deleted whether or not this option is turned on.

Show Moved Appointment confirmation screen

Disable this option to prevent the confirmation screen from appearing when moving an appointment. This screen is used to verify that the appointment will be moved to the correct employee and time and it is recommended to leave it on.

Disable Walk-in check box on Appointment Screen

Enable this option to disable the “This Client is a Walk-in” check box on the Appointment screen. This option is overridden by the option to set the business as Walk-in based.

Clients

Uppercase Clients

You can set up Insight to record all vital client information (Name, Address, Etc.) in all upper case letters. In some cases, this can eliminate "ugly" mailing labels where employees who add clients into the system do not properly capitalize information.

Use Default Area Code When Searching

If this option is enabled Insight will automatically use and fill in the default area code when searching by phone numbers. If it is disabled then the user will have to enter the area code.

Client Verification

Insight can prompt you to verify the spelling of the clients name, current address, and phone numbers at various points in the program. If this option is selected, a verification window will pop up and the operator will have to verify that the information is correct or modify it to make it correct before continuing. The date and name of the person who verified the information are recorded by Insight on the Client Information Screen. The verification window will appear at the time of check in, creating a new invoice, or booking a new appointment and will only pop up for customers who have not had their information verified within a certain time period. (You can specify the time period by going to the Defaults section of the System Setup Area.) This function has proven very useful for businesses that regularly market to their clients via mail or who perform call-backs to verify appointments etc. It has dramatically reduced the amounts of misdirected mail since there is accountability directed at the last employee to "verify" that the information was correct.

No Client Phone Number Password

By default, Insight will require a password to be entered before it will allow the phone numbers to be displayed in a client lookup screen. This is for added security to ensure that anyone accessing phone numbers has that privilege. If this extra step is not required by your business, you can choose to have the phone numbers displayed automatically so your employees will not have to type their password each time to search by phone number.

Duplicate Client Checking

If this option is enabled, Insight will automatically check for possible duplicate clients when you are in the process of adding a new client. This is based on finding the exact first and last name, or the same phone number. If Insight finds a match for either of these two things while you are adding a new client, it will pop up a window listing all the possible matches and allow you to select one of them to use instead of adding a duplicate.

Use Popup Feature on Client Notes

If this option is enabled, Insight will automatically display any notes associated with a client if either the Appointments or Sales popup box is checked. The messages will be displayed immediately after the client is selected in the appropriate area. If the Appointments box is checked, the notes will be displayed after the client is selected while booking an appointment or adding the client to the Walk-In list. If the Sales box is checked, the notes will be displayed when starting a new invoice for a client, checking in an appointment, or checking in a client from the Walk-In list.

Require Client Phone Numbers

If this option is enabled, Insight will require at least one valid phone number be entered before a client record can be saved.

Inventory

Temporary Cost Changes

You can set up Insight to ask if adjustments that are being made to the cost of an item when receiving a PO are permanent or just temporary cost changes. This option can be useful for businesses that receive a lot of discounts on products they order based on sales promotions but where the actual cost of the items they order does not change very often.

Use Unit Cost for Calculations

By default, Insight uses the Average Cost value for each product to calculate the markup for that product. You can now choose to have this value calculated based on the Unit Cost instead. This may make a slight difference in the calculated markups and overall calculated value of your inventory.

Use Smaller Barcode Labels

By default, Insight will print all barcodes on large size labels as follows:

Letter: 3 columns and 10 rows of labels (30 per page)
A4: 3 columns and 8 rows of labels (24 per page)

We have added the ability to print barcodes on smaller labels that will use less paper.

Letter: 4 columns and 20 rows of labels (80 per page)
A4: 5 columns and 13 rows of labels (65 per page)

Since these labels are much smaller, we recommend that you print a few off on your printer on regular paper before purchasing an entire box of labels since some printers may not print the barcodes clearly enough for the scanners to work correctly.

Use Constant Stock Level Ordering Method

Enabling this option will cause Insight to use the constant stock level ordering method. By default Insight uses a reorder point method. This option primarily affects how purchase orders are built.

Display Usage / Warning Messages

If this option is enabled, Insight will automatically display any usage and warning messages associated with any products or services. The messages will be displayed immediately after the product or service is added to a client's invoice. For services, the messages will also be displayed when the service is chosen while booking an appointment, and when the appointment is checked in.

Employee

More Secure Passwords

A different method of password protection is available. Using this new method, Insight assigns each employee a random password (4 numeric characters). Only the master password will allow anyone to view another employee's password. If someone forgets their password, Insight will randomly assign a new code to that individual. This is a much more secure password method but is only recommended for businesses where security is a major concern.

Payroll

Disable Prior Pay Period Adjustments

Enabling this option will stop Insight from recalculating previous Payrolls to maintain accurate Payrolls after editing Invoices or Time Clock entries.

Use Method A payroll calculations to determine Payroll Taxes

Method A Payroll only takes into account the employee's earning in the current payroll period to project their annual earnings for determining how much tax they should pay. This method is susceptible to large variations in pay, but the setup does not need to be as exact. The tax numbers from this method will be inline with reading the numbers from a tax table.

Method B Payroll looks at the employee's total YTD earning to project their annual earnings for determining how much tax they should pay. This method is more accurate (with tax amounts almost to the penny of their end of year tax assessment) but the setup must be done correctly. This method keeps the money in the pocket of the employee rather than getting a rebate.

Changing this to Method B from Method A during the year may result in several pay periods with no tax deducted as Method A tends to deduct more than necessary and often results in the employee overpaying. Method B will determine that they have overpaid and will therefore deduct no tax.

Miscellaneous

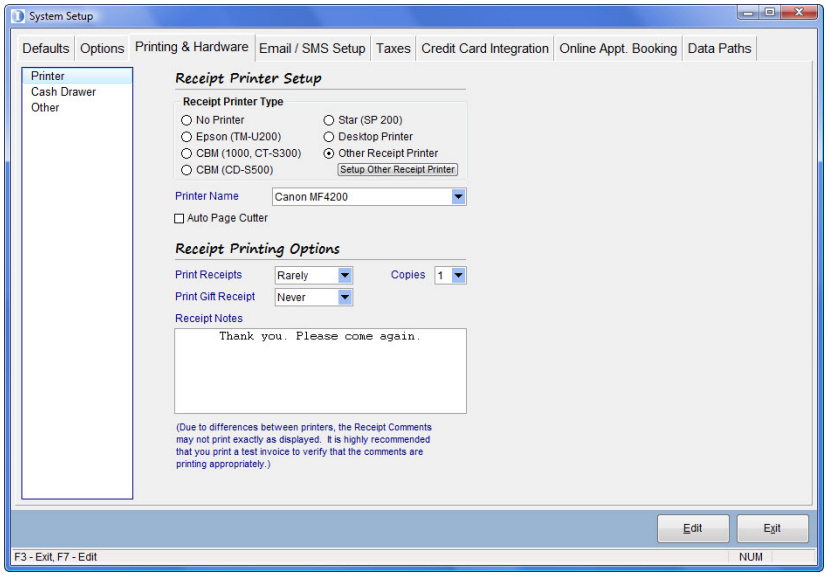
Business is primarily 'Walk-In' based

Enabling this option will make entering "named walk-in" clients faster on the Walk-in, Sales, and Appointment Book screens. If this option is enabled the Walk-In checkbox on the those screens will automatically have "This client is a Walk-in" checked.

Require Reason for No-Sales (Opening Drawer)

If this option is enabled, Insight will prompt for a reason to be entered when doing a No-Sale (opening cash drawer). The reason must be entered or the cash drawer will not be opened.

Printing and Hardware Tab



Printer

Your receipt printer needs to be set up in Windows before you can complete this section of Insight. Please make sure that this has been done, and call the Insight technical support line if you need assistance with this.

Receipt Printer Type

This option allows you to select the make and model of the printer that you will be using to provide receipts to your clients. If you do not see your printer type listed, and it is an actual type of slip receipt printer, choose the Other Receipt Printer option.

Setup Other Receipt Printer button

This button only appears if you select the Other Receipt Printer option above. Clicking it will pop up a window that allows you to specify the Characters Per Line, Buffer Size, and Lines Per Second of your receipt printer. Please call the Insight technical support line if you need assistance with this.

Printer Name

If your receipt printer is properly installed into your copy of Windows, it will appear in the drop-down list in this field. You must select it in this field for the receipt printing to work properly in Insight.

Auto Page Cutter

This checkbox only appears if you select the Other Receipt Printer option above. You should check this field if your receipt printer has a cutter on it that automatically cuts the receipt for you rather than you needing to rip it off after it prints the receipt.

Receipt Printing Options

Print Receipts

This field is used to tell Insight how often you will be printing receipts for your clients. The four options are “Always”, “Usually”, “Rarely”, or “Never”. If you select “Usually” or “Rarely”, Insight will ask if you want to print a receipt each time you complete a sales transaction. If the “Usually” option is selected, the default answer to this question will be “Yes” and it will default to “No” if you have chosen the “Rarely” option. If you select “Always” or “Never”, Insight will not ask you about printing the receipt.

Copies

This field is used to get Insight to print more than one copy of a receipt. While some receipt printers support the use of two part receipt paper rolls, many do not. In that case, you can specify that Insight should print up to three copies of each receipt.

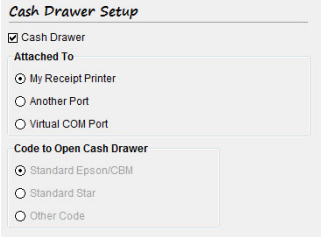
Print Gift Receipt

This field allows you to choose whether to always or never have a gift receipt printed. This is a receipt with the items, but no amounts on it, suitable for including with a gift. The recipient has the ability to return the item, but does not have to know how much you spent.

Receipt Notes

In this field you can type any notes that you would like to have appear on the bottom of all of your printed receipts. This may include a thank you, a description of your return policy, or perhaps your business hours, anything you like.

Cash Drawer



Cash Drawer

Click this checkbox if you have a cash drawer attached to your computer.

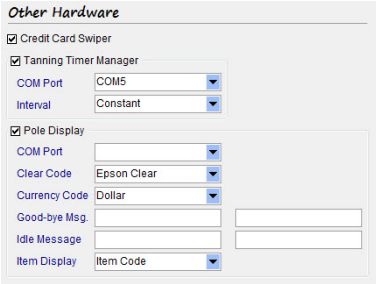
Attached To

This field allows you to specify how your cash drawer is attached to your computer. This can be through your receipt printer, another port that you can choose in the drop-down list, or through a virtual COM port.

Code to Open Cash Drawer

This option is for the type of code required to automatically open your cash drawer. Select the type of receipt printer that you have if applicable. If you select Other Code, you will need to enter that code into the field that appears beside that option.

Other



Credit Card Swiper

Click this checkbox if you have a credit card swiper attached to your computer.

Tanning Timer Manager

Click this checkbox if you have a tanning timer manager attached to your computer. Once you do this, the setup options for the timer manager will become enabled. At the printing of this manual, only T-Max Managers are supported.

COM Port

This field allows you to specify which communications port your timer manager is connected to.

Interval

This field controls how often Insight will contact the timer manager to get updated information on the tanning bed timers. If you have quite a few timers attached to your manager, you may need to change this setting to something other than 'Constant' so that Insight has enough time to process all the information received before sending a new request to the manager.

Pole Display

Click this checkbox if you have a pole display unit attached to your computer. Once you do this, the setup options for the pole display will become enabled.

COM Port

This field allows you to specify which communications port your pole display is connected to.

Clear Code

This field controls what kind of code is used to clear the display of the pole unit. There are two standard options available as well as “Other” which, if selected, will display another field where you can enter in the appropriate control code.

Currency Code

This field controls what kind of code is used to display your local currency symbol on the pole unit. There are two standard options available as well as “Other” which, if selected, will display another field where you can enter in the appropriate control code.

Good-bye Msg.

In these fields you can enter the one or two line message to display to the customer after a sale is finished. You can enter up to 20 characters in each field.

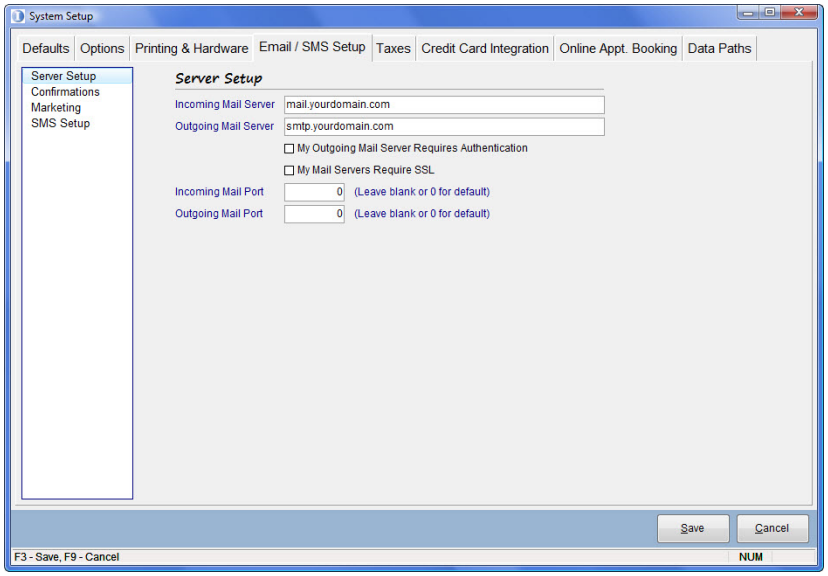
Idle Message

In these fields you can enter the one or two line message to display to the customer while the pole display is not being used. This is any time that someone is not in the process of ringing through a sale. You can enter up to 20 characters in each field.

Item Display

This field allows you to choose whether to display the item code or item description to the customer on the pole display when ringing through a sale. Keep in mind that there are only 20 characters that can be displayed on one line, so in some cases, your item descriptions may be too long and get cut off. On the other hand, item codes will sometimes not be understood by the customer depending on how you have set up your codes, so there is some consideration to be given to which field to display.

Email / SMS Setup Tab



Server Setup

Incoming Mail Server

This field is for the name of the mail server that your email provider uses for you to read mail. Usually it will be something like “mail.yourdomain.com”, where the “yourdomain” part is either your website’s address or your internet provider’s web address.

Outgoing Mail Server

This field is for the name of the mail server that your email provider uses for you to send mail. Usually it will be something like “smtp.yourdomain.com”, where the “yourdomain” part is your internet provider’s web address.

My Outgoing Mail Server Requires Authentication

This field should be checked only if your mail server requires you to supply a password to be able to send email. Please check with your internet email provider if you are unsure of whether or not you need this.

My Mail Servers Require SSL

This field should be checked only if your mail server uses a secure mail protocol for sending and/or receiving emails.

NOTE: If you do not know what these server settings should be, you must call the company that provides your internet service, not Insight support.

Incoming Mail Port

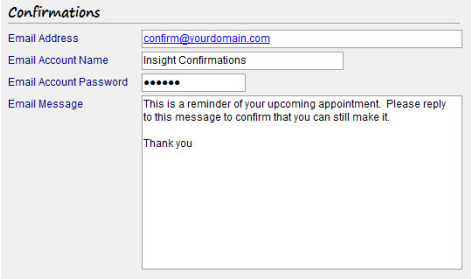
This field gives you the ability to specify which port to use for receiving email as some internet providers have started to block the default port used by email. Leave this blank unless your internet provider tells you that you need to specify the port.

Outgoing Mail Port

This field gives you the ability to specify which port to use for sending email as some internet providers have started to block the default port used by email. Leave this blank unless your internet provider tells you that you need to specify the port.

Confirmations

This section is where you set up the email settings for sending email appointment confirmations to your clients.


Confirmations
Email Address
confirm@yourdomain.com
Email Account Name
Insight Confirmations
Email Account Password
Email Message
This is a reminder of your upcoming appointment. Please reply to this message to confirm that you can still make it.
Thank you

Email Address

This is the email address to use for doing your email confirmations. This is where the replies to the confirmation emails will be sent.

Email Account Name

This is the name for the email account that you set up through your internet email provider.

Email Account Password

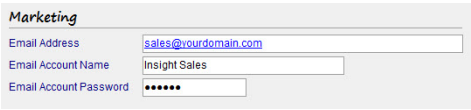
This is the password for the email account that you set up through your internet email provider.

Email Message

This field is where you can enter in the message that you want to be sent automatically to your clients when confirming their appointments.

Marketing

This section is where you set up the email settings for sending marketing related email to your clients. For instance, informing them of upcoming sales or new products or services.



Email Address

This is the email address to use for sending marketing email.

Email Account Name

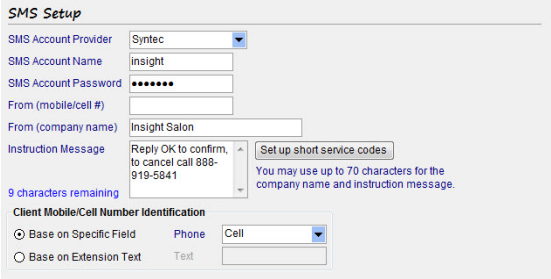
This is the name for the email account that you set up through your internet email provider.

Email Account Password

This is the password for the email account that you set up through your internet email provider.

SMS Setup

This section is where you set up the settings for sending SMS text messages to your clients.



SMS Account Provider

Select the appropriate provider that you have signed up with for an account to send text messages.

SMS Account Name

This is the name for the account that you set up through your SMS account provider.

SMS Account Password

This is the password for the account that you set up through your SMS account provider.

From (mobile/cell #)

This is the number that your SMS account provider assigns to you that will enable Insight to automatically receive replies to the SMS messages that you send

From (company name)

This field is for a short version of your company name that will be included in SMS appointment confirmation messages. It is important to keep this name short to conserve space, but also still be recognizable to your clients.

Instruction Message

This is for the instructions that will be added to the end of appointment confirmation messages. Typically, it should briefly tell your client how to respond to the message.

Set up short service codes button

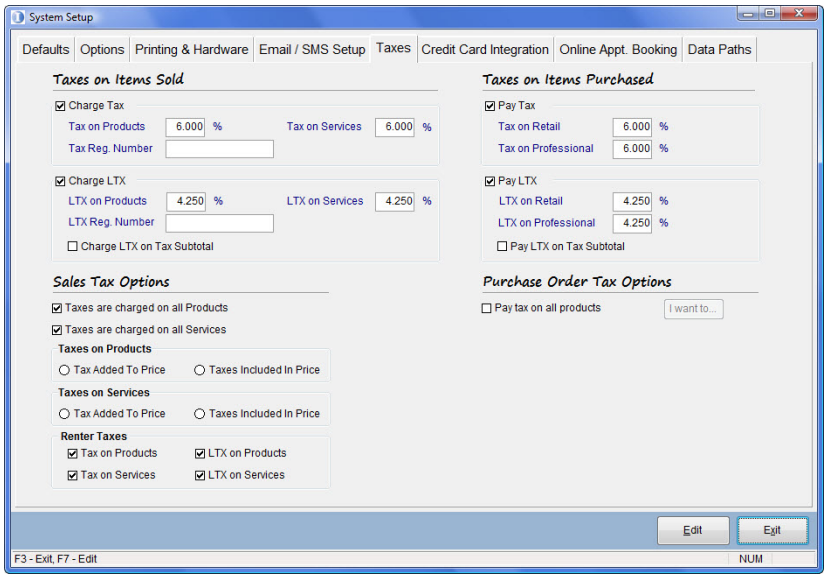
Clicking this button will bring up a window with all of your services displayed in a grid. It will allow you to quickly go through your services and assign short SMS code descriptions of them. It is important to keep these codes short to conserve space, but also still be recognizable to your clients.

Client Mobile/Cell Number Identification

This section allows you to tell Insight which phone number field to use as the mobile/cell phone number when sending SMS text messages to your clients. If you normally put mobile numbers into the same field on the client screen, choose the “Base on Specific Field” option and then choose which phone number field to use. If you have mobile numbers in different fields on the client screen, you can choose a word such as “cell” or “mobile” to identify them and put that in the extension field on the client screen. Then use that same word in the Text field on this screen and Insight will be able to tell which phone numbers are to be used as mobile numbers.

Taxes Tab

This tab is where you will set up the sales taxes that you charge on products and/or services, or pay when you purchase products from your suppliers. Be sure to enter the tax amounts as percentages, i.e. 6 percent should be entered as 6, not 0.06.



Taxes on Items Sold

Charge Tax (GST in Canada and Australia, VAT in UK)

This field should be checked if you must charge Tax or GST when you sell products and/or services.

Tax/GST on Products

This is the tax percentage that you charge on product sales.

Tax/GST on Services

This is the tax percentage that you charge on service sales.

Tax/GST Registration Number

This field is for your Tax/GST registration number. Filling this in is optional.

Charge LTX (PST in Canada)

This field should be checked if you must charge a local or provincial tax when you sell products and/or services.

LTX/PST on Products

This is the tax percentage that you charge on product sales.

LTX/PST on Services

This is the tax percentage that you charge on service sales.

LTX/PST Registration Number

This field is for your LTX/PST registration number. Filling this in is optional.

Charge LTX/PST on Tax/GST Subtotal

This field should only be checked if you charge the LTX/PST tax on top of the Tax/GST as well as the products and/or services you are selling. Most areas do NOT do this.

Taxes are charged on all:

Services

This field should be checked if you always charge tax for all of your services. If there are any exceptions, you should uncheck this field.

Products

This field should be checked if you always charge tax for all of your products. If there are any exceptions, you should uncheck this field.

I want to… button

This button will be available if either of the Services or Products checkboxes to the left are unchecked. It allows you to set or remove the charge tax checkboxes from each individual product or service.

Taxes on Products / Taxes on Services

Tax Added To Price

Select this option if you add taxes on top of your prices at the time of sale. The taxes will be updated on the sales screen as you add items to the invoice.

Taxes Included In Price

Select this option if you wish the taxes to be included in the prices of your items. This allows you to have round number prices but still charge the applicable sales tax to your customers.

Taxes on Items Purchased

Pay Tax (GST in Canada and Australia, VAT in UK)

This field should be checked if you must pay Tax or GST when you purchase products from your vendors.

Tax/GST on Retail

This is the tax percentage that you pay for products.

Tax/GST on Professional

This is the tax percentage that you pay for professional products.

Pay LTX (PST in Canada)

This field should be checked if you must pay a local or provincial tax when you purchase products from your vendors.

LTX/PST on Retail

This is the tax percentage that you pay for products.

LTX/PST on Professional

This is the tax percentage that you pay for professional products.

Pay LTX/PST on Tax/GST Subtotal

This field should only be checked if you pay the LTX/PST tax on top of the Tax/GST as well as the products you are purchasing. Most areas do NOT do this.

Pay tax on all products

This field should be checked if you always pay tax for all of your products. If there are any exceptions, you should uncheck this field.

I want to… button

This button will be available if the "Pay tax on all products" checkbox to the left is unchecked. It allows you to set or remove the charge tax checkboxes from each individual product.

Renter Taxes

Tax on Products (GST in Canada and Australia, VAT in UK)

This field should be checked if you charge this tax on product sale commissions paid by your renters or self-employed associates

Tax on Services (GST in Canada and Australia, VAT in UK)

This field should be checked if you charge this tax on rental fees or service sale commissions paid by your renters or self-employed associates

LTX on Products (PST in Canada)

This field should be checked if you charge this tax on product sale commissions paid by your renters or self-employed associates

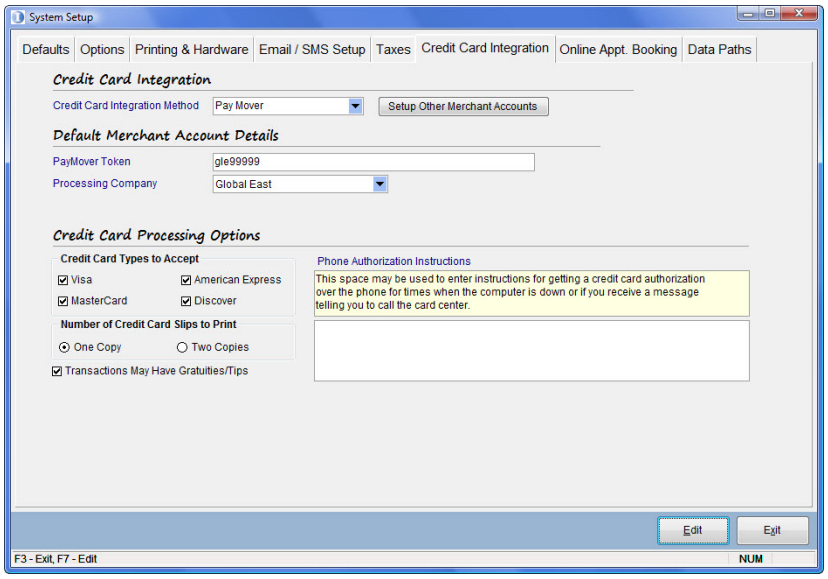
LTX on Services (PST in Canada)

This field should be checked if you charge this tax on rental fees or service sale commissions paid by your renters or self-employed associates

Credit Card Integration Tab

This section is only available if you have the credit card integration add-on module for Insight that allows you to process credit card payments directly through Insight. An Insight technical support representative will guide you through the setup of this area after your merchant provider account has been approved.

NOTE: Changing any of the fields in the top section of this screen without being asked to by an Insight support rep will probably take away your ability to process credit cards through Insight.



Credit Card Integration Method

This is the method of card processing that you will be using. The options are X-Charge, PC Charge, PayMover, and MerchantWARE.

Setup Other Merchant Accounts button

This button allows you to set up multiple accounts for processing credit cards. This is useful if you have renters or self-employed associates who will be processing their own credit cards. When you click this button, a new screen will pop up with the relevant fields on it that correspond to the ones listed below. You can add as many new accounts as are required for your business.

IP of Computer (with PC Charge and X-Charge only)

This field is for the IP address of the computer that has the credit card processing software installed on it.

Port Number (with PC Charge and X-Charge only)

This field is for the Port Number to use with the software.

Merchant ID (with X-Charge only)

This field is for the Merchant ID to use with the X-Charge software.

PayMover Token (with PayMover integration only)

This field stores your unique ID that allows you access to the PayMover payment gateway. The field below allows you to select the payment processor you will be going through.

Processing Company (with PayMover, PC Charge and MerchantWARE only)

This field allows you to select the merchant through which you will be processing your credit card payments.

Account Name (with MerchantWARE only)

This field is for the Account Name that you will receive after being approved by your merchant provider.

MerchantWare Site ID (with MerchantWARE only)

This field is for the MerchantWare Site ID number that you will receive after being approved by your merchant provider.

MerchantWare Key (with MerchantWARE only)

This field is for the MerchantWare Key number that you will receive after being approved by your merchant provider.

Merchant Number (with PC Charge only)

This field is for the PC Charge ID number that you will receive after being approved by your merchant provider.

Transaction File Location (with X-Charge, PC Charge and MerchantWARE only)

This field stores the location on your computer or network where the credit card processing software creates and uses the transaction files required for processing each credit card transaction.

Credit Card Types to Accept

This section allows you to specify which of the major credit cards you can accept through the credit card integration.

Number of Credit Card Slips to Print

This section allows you to specify how many copies of the credit card slip to print. If you are using a thermal receipt printer, you may need to print two copies.

Transactions May Have Gratuities/Tips

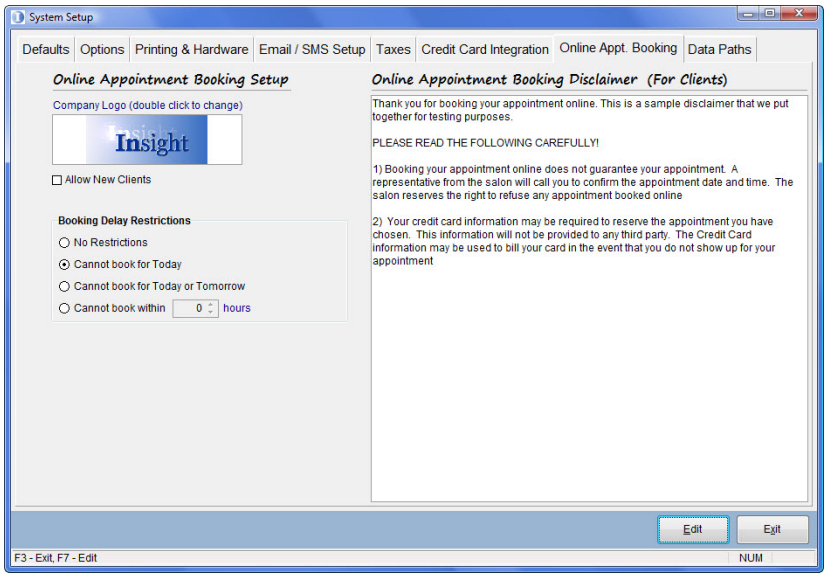
This field should be checked if your business allows clients to leave tips for your employees using their credit card. Insight will print a credit card slip for the client to write on before actually authorizing the card, so that once the tip amount is known, the transaction can be put through as a straight sale as opposed to a pre-auth and post-auth. This will give you much better rates with your merchant provider, but must be completed before you return the card to the client.

Phone Authorization Instructions

This space may be used to enter instructions for getting a credit card authorization over the phone for times when the computer is down or if you receive a message telling you to call the card center.

Online Appt. Booking Tab

This section is only available if you have the online appointment booking add-on module for Insight that allows you to accept appointment bookings over the internet.


System Setup
Defaults
Options
Printing & Hardware
Email / SMS Setup
Taxes
Credit Card Integration
Online Appt. Booking
Data Paths
Online Appointment Booking Setup
Company Logo (double click to change)
Insight
Allow New Clients
Booking Delay Restrictions
No Restrictions
Cannot book for Today
Cannot book for Today or Tomorrow
Cannot book within 0 hours
Online Appointment Booking Disclaimer (For Clients)
Thank you for booking your appointment online. This is a sample disclaimer that we put together for testing purposes.
PLEASE READ THE FOLLOWING CAREFULLY!
1) Booking your appointment online does not guarantee your appointment. A representative from the salon will call you to confirm the appointment date and time. The salon reserves the right to refuse any appointment booked online
2) Your credit card information may be required to reserve the appointment you have chosen. This information will not be provided to any third party. The Credit Card information may be used to bill your card in the event that you do not show up for your appointment
Edit
Exit
F3 - Exit, F7 - Edit
NUM

Company Logo

This is the logo that will be displayed to your clients on the appointment booking web page. When you double-click on the image area, a Windows file selection screen will pop up that allows you to select your company logo image file that is stored somewhere on your computer.

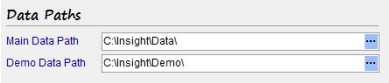
Allow New Clients

If this box is checked, new clients that have not been to your business before will be allowed to book appointments online.

Online Appointment Booking Disclaimer

The text entered here will be displayed to your clients on the appointment booking web page. They must agree to these terms and conditions to be able to book appointments online.

Data Paths Tab



Main Data Path

This field is for the location of the main Insight data folder. This is where all of your live/real information is stored. Please do not change this field unless instructed to by an Insight technical support representative.

Demo Data Path

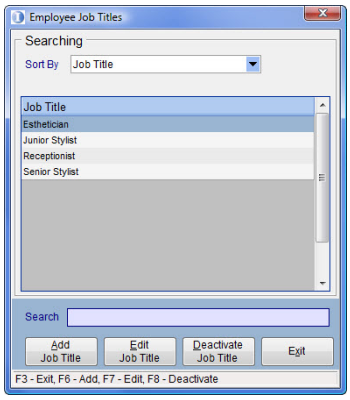
This field is for the location of the Insight demo data folder. This is where all of your demo/test data is stored. Please do not change this field unless instructed to by an Insight technical support representative.

Job Titles

Using Job Titles gives you a way to group your employees. We highly recommend setting up a Job Title for each of your employees so those that are similar can be grouped and compared in various reports and the appointment book. There are a number of reports that give you the option to use the Job Title to filter for a smaller group of your employees rather than having your entire staff show up.

How to Add a Job Title

- Click on the Setup button on the Insight Menu Bar
- Click on Job Titles in the menu



- Click the Add Job Title button or press F6 on your keyboard
- You will then see that the Search field disappears and you are able to enter a new Job Title
- Type in the new name noting that you may not have more than one Job Title with the same name

> ***TIP: It is best to go into as much detail as possible when selecting your Job Titles. Don't just lump everyone together as a "Stylist" or "Esthetician". At the same time, don't give every employee a Job Title unique to only them. For example, a hair salon might choose to have a "Junior Stylist", "Intermediate Stylist", "Senior Stylist", and "Color Technician" and so on.***

- Click the Save button or press F3 on your keyboard

Job Titles Reference

Job Title grid

The grid is the main feature of this screen and contains all of your job titles. The entire screen is essentially the Active Lookup for your job titles. Please refer to the "Active Lookups" section on page 1 to learn how this feature is designed to be used. The only field (other than the Active Lookup Search field) that is available on this screen is the Job Title field, which only appears in add or edit mode.

Function Buttons

The function buttons in the bottom right section of the screen allow you to perform the most common tasks for this screen. Most of the function buttons have an F-key associated with them that you can press on your keyboard instead of clicking the button with your mouse.

Previous (F4)

There is no button associated with this function key. Pressing F4 on your keyboard will select the job title that is above the one that you are currently on.

Next (F5)

There is no button associated with this function key. Pressing F5 on your keyboard will select the job title that is below the one that you are currently on.

Add Job Title (F6)

Clicking this button will go into add mode to allow you to add a new job title.

Edit Job Title (F7)

Clicking this button will go into edit mode so that you may edit the selected job title.

Delete Job Title (F8)

Clicking this button will delete the currently selected job title.

Exit (F3)

Clicking this button will close the Job Titles screen.

Save (F3) (when in add or edit mode)

Clicking this button will save your changes and return to browse mode.

Cancel (F9) (when in add or edit mode)

Clicking this button will cancel your changes and return to browse mode.

Departments & Categories

Departments and Categories are Insight's way of grouping your products and services together so that you can see relevant information in your sales reports.

What is a Department?

The intention of a Department is to allow a "multi-faceted" business (such as a Salon and Spa) to break its business into parts (in this case a Salon and a Spa). If your business only deals with one main "business model" then you will most likely want to consider just having one Department to cover the entire business. Each Department can (and should have) many Categories.

What is a Category?

The intention of a Category is to break down each Department of your business into smaller "related" sections. For example, a day spa may set up two simple Departments of "Salon" and "Spa". In the "Salon" Department, they might want to add in Categories like "Shampoo", "Conditioner", "Gel/Hairspray", "Haircuts", "Colors", "Perms", etc. In the "Spa" Department they might add Categories like "Massage", "Waxing", "Nails", "Facials", etc. Some of those Categories will probably only be relevant to products (Shampoo) or services (Haircuts) while other Categories could have both (Massage can have services as well as massage oils and other products).

Please note that each Category that can contain Services will allow you to set up a Default Service Color. This color will be used by the Appointment Book so that you can easily see what type of service is booked based on the color of the block on the appointment screen. For example, you might set up your "Haircuts" to all be Blue, "Colors" might all be Brown and "Perms" might be Orange. You can set these colors up however you want to but it can be a great tool for being able to quickly see where all of your color services are when viewing your appointment screen.

How to Add Departments & Categories

- Click on the Setup button on the Insight Menu Bar
- Click on Departments & Categories in the menu

Adding a Department

- Click the Add Department button or press F6 on your keyboard
- Enter the Department Name and then select whether the department will contain only products, only services, or both
- Perform the following indented steps to add as many categories as you wish to the new department
  - Add categories to the new department by clicking the Add button under the Categories grid
  - Enter the Category Name and then select whether the category will contain only products, only services, or both
  - If the category is able to contain services, you may now choose a color to represent those services when they appear on the appointment screen
- Click the Save button or press F3 on your keyboard

Adding a Category to an existing Department

- Select the department that you wish to add the category to

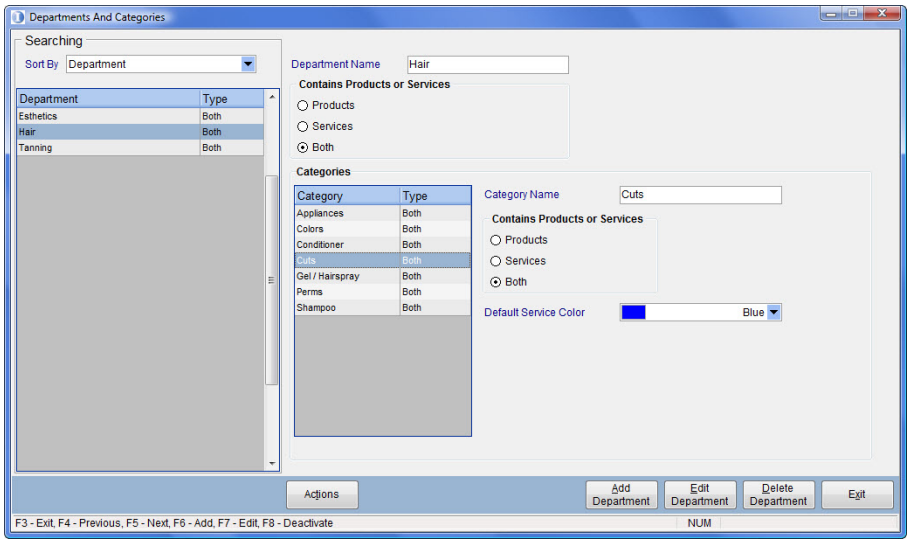
- Click the Edit Department button or press F7 on your keyboard
- Click the Add button or press Alt-A on your keyboard
- Enter the Category Name and then select whether the category will contain only products, only services, or both
- If the category is able to contain services, you may now choose a color to represent those services when they appear on the appointment screen
- Click the Done button or press F3 on your keyboard

Tips for Configuring Departments & Categories

Spend some time coming up with a plan for how you want to categorize your products and services. Once you have a plan in place, write down all the departments and the categories in each department before you enter them into Insight. This will allow you to think through how everything is going to work before you have gone too far. Insight has numerous reports that are broken down by department and/or category. There are a couple of different ways that you can choose to set this section up. How you do it will depend on what relevant information you want to see in your inventory and sales reports. If you have any questions about setting this area up please do not hesitate to call customer support. This is one of the most important areas of the software to configure correctly.

Departments and Categories Reference

For an overview of the general purpose and function of departments and categories, please see the "What is a Department?" and "What is a Category?" sections on page 274.



Active Lookup

The Active Lookup area in the left area of the screen is where you can search to find the department you wish to work with. Please refer to the "Active Lookups" section on page 1 to learn how this feature is designed to be used.

Department Name

The Department Name must be unique. When you are adding or editing a department, you can type into this field. If you are adding or editing a category, this field will just give you a drop-down list allowing you to choose the department for the category to belong to.

Contains Products or Services

This option allows you to specify what the department will contain. Choosing the Both option gives you the most flexibility.

Categories grid

The grid contains all of the categories within the department that you have selected in the main grid on the left.

Category Name

The Category Name must be unique within the department. That is, you may have two categories with the same name, but they cannot be in the same department.

Contains Products or Services

This option allows you to specify what the category will contain. Choosing the Both option gives you the most flexibility. You will only be able to change this option if it is set to Both at the department level above the Categories grid.

Default Service Color

This field allows you to select the default color that services within the category will show up in when they are booked on the appointment book. This can serve as a quick visual reference on the appointment book as to what type of service is booked in any given slot without having to look closely to see exactly what service it is.

Actions Button

The Actions button brings up a menu of the lesser-used functions on each screen. The options available from the Departments and Categories screen are discussed below:

Move Products/Services to Another Category

This option allows you to move all products and/or services from one category into another. The new category can even be in a different department. A new window will pop up and you will need to select the department and category to move from. Insight will show you how many products, professional products, and services exist in the selected category. You can check off which group you want to move into a different category, then select the department and category to move them into. You will also have the option to have all past sales information for the items that are being moved to also be moved into the new category. Generally, we recommend that you choose Yes to this option.

Deactivate Products/Services in a Category

This option allows you to deactivate all products and/or services in one category at once. A new window will pop up and you will need to select the department and category to deactivate items from. Insight will show you how many products, professional products, and services exist in the selected category. You can then check off which group you want to deactivate.

Reset the Service Color for a Category

This option allows you to reset all of the colors assigned to individual services in one category to the default category color. A new window will pop up and you will need to select the department and category to deactivate items from. Insight will show you the default color for the selected category. You can then confirm whether you want to reset all of the services in that category to the default color.

Function Buttons

The function buttons in the bottom right section of the screen allow you to perform the most common tasks for this screen. Most of the function buttons have an F-key associated with them that you can press on your keyboard instead of clicking the button with your mouse.

Previous (F4)

There is no button associated with this function key. Pressing F4 on your keyboard will select the category in the department that is above the one that you are currently on.

Next (F5)

There is no button associated with this function key. Pressing F5 on your keyboard will select the category in the department that is below the one that you are currently on.

Add Department (F6)

Clicking this button will go into add mode to allow you to add a new department.

Edit (F7)

Clicking this button will go into edit mode so that you may edit the selected department.

Delete (F8)

Clicking this button will delete the currently selected department. You will only be able to do this if you are deleting a department that does not have any categories in it. None of your sales information will be deleted.

Exit (F3)

Clicking this button will close the Departments and Categories screen.

Save or Done(F3) (when in add or edit mode)

Clicking this button will save your changes and return to browse mode.

Cancel (F9) (when in add or edit mode)

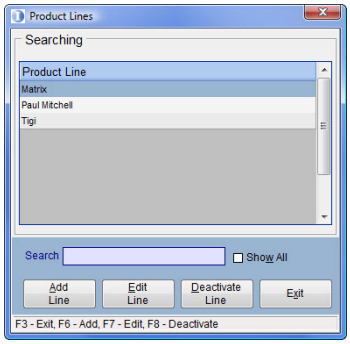
Clicking this button will cancel your changes and return to browse mode.

Product Lines

Product Lines are optional and give you an extra way to further group your products. The most common way to use this is to enter in all the manufacturer names for the products you carry. So, for a hair salon, you might include such names as Matrix, Paul Mitchell, Tigi, etc. There are a number of reports that give you the option to use the Product Line to filter for a smaller group of your products rather than having your entire product list show up.

How to Add a Product Line

- Click on the Setup button on the Insight Menu Bar
- Click on Product Lines in the menu



- Click the Add Line button or press F6 on your keyboard
- Enter a unique Name to identify this product line
- Click the Save button or press F3 on your keyboard

Product Lines Reference

Product Line grid

The grid is the main feature of this screen and contains all of your product lines. The entire screen is essentially the Active Lookup for your product lines. Please refer to the "Active Lookups" section on page 1 to learn how this feature is designed to be used. The only field (other than the Active Lookup Search field) that is available on this screen is the product line Name field, which only appears in add or edit mode.

Function Buttons

The function buttons in the bottom right section of the screen allow you to perform the most common tasks for this screen. Most of the function buttons have an F-key associated with them that you can press on your keyboard instead of clicking the button with your mouse.

Previous (F4)

There is no button associated with this function key. Pressing F4 on your keyboard will select the product line that is above the one that you are currently on.

Next (F5)

There is no button associated with this function key. Pressing F5 on your keyboard will select the product line that is below the one that you are currently on.

Add Line (F6)

Clicking this button will go into add mode to allow you to add a new product line.

Edit Line (F7)

Clicking this button will go into edit mode so that you may edit the selected product line.

Deactivate Line (F8)

Clicking this button will mark the currently selected product line as deactivated. It will disappear from the Active Lookup unless you have Show All checked, in which case it will appear in red. None of your sales information will be deleted.

Exit (F3)

Clicking this button will close the Product Lines screen.

Save (F3) (when in add or edit mode)

Clicking this button will save your changes and return to browse mode.

Cancel (F9) (when in add or edit mode)

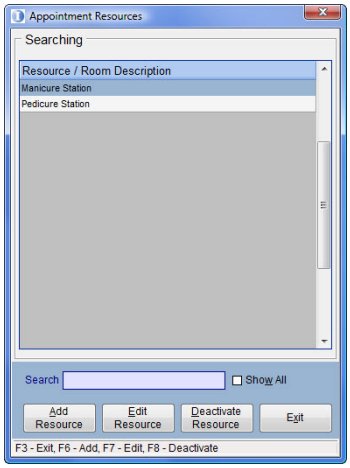
Clicking this button will cancel your changes and return to browse mode.

Appointment Resources

An Appointment Resource in Insight is considered to be a room, table, seat, or something similar that is required in order to provide a certain service. If you provide massage services, chances are you have at least one room set aside for providing massages. This resource needs to be tracked in Insight so you do not get conflicting appointments where a room is double booked. You may have three employees who can perform a massage but only two massage tables available so Insight needs to know that only two massages can be booked at the same time.

How to Add a Resource

- Click on the Setup button on the Insight Menu Bar
- Click on Appointment Resources in the menu



- Click the Add Resource button or press F6 on your keyboard
- You will then see that the Search field disappears and you are able to enter a new Resource
- Type in the new name noting that you may not have more than one Resource with the same name
- Click the Save button or press F3 on your keyboard

Appointment Resources Reference

Resource grid

The grid is the main feature of this screen and contains all of your resources. The entire screen is essentially the Active Lookup for your resources. Please refer to the "Active Lookups" section on page 1 to learn how this feature is designed to be used. The only field (other than the Active Lookup Search field) that is available on this screen is the Resource Description field, which only appears in add or edit mode.

Function Buttons

The function buttons in the bottom right section of the screen allow you to perform the most common tasks for this screen. Most of the function buttons have an F-key associated with them that you can press on your keyboard instead of clicking the button with your mouse.

Previous (F4)

There is no button associated with this function key. Pressing F4 on your keyboard will select the resource that is above the one that you are currently on.

Next (F5)

There is no button associated with this function key. Pressing F5 on your keyboard will select the resource that is below the one that you are currently on.

Add Resource (F6)

Clicking this button will go into add mode to allow you to add a new resource.

Edit Resource (F7)

Clicking this button will go into edit mode so that you may edit the selected resource.

Deactivate Resource (F8)

Clicking this button will mark the currently selected resource as deactivated. It will disappear from the Active Lookup unless you have Show All checked, in which case it will appear in red.

Exit (F3)

Clicking this button will close the Appointment Resources screen.

Save (F3) (when in add or edit mode)

Clicking this button will save your changes and return to browse mode.

Cancel (F9) (when in add or edit mode)

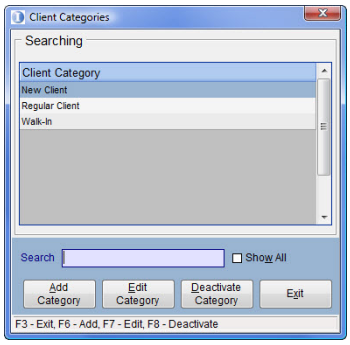
Clicking this button will cancel your changes and return to browse mode.

Client Categories

Categorizing your clients can be done in a number of ways. Some businesses will set up categories such as “Regular Client”, “New Client”, “New Request”, etc. These types of categories can be used to track client retention. Some other businesses will use categories such as “Student”, “Homemaker”, “Professional”, etc. These types of categories can be used to track various demographics to determine what type of people you should be marketing to.

How to Add a Client Category

- Click on the Setup button on the Insight Menu Bar
- Click on Client Categories in the menu



- Click the Add Category button or press F6 on your keyboard
- You will then see that the Search field disappears and you are able to enter a new Category
- Type in the new name noting that you may not have more than one Category with the same name
- Click the Save button or press F3 on your keyboard

Client Categories Reference

Client Category grid

The grid is the main feature of this screen and contains all of your client categories. The entire screen is essentially the Active Lookup for your client categories. Please refer to the “Active Lookups” section on page 1 to learn how this feature is designed to be used. The only field (other than the Active Lookup Search field) that is available on this screen is the Category Description field, which only appears in add or edit mode.

Function Buttons

The function buttons in the bottom right section of the screen allow you to perform the most common tasks for this screen. Most of the function buttons have an F-key associated with them that you can press on your keyboard instead of clicking the button with your mouse.

Previous (F4)

There is no button associated with this function key. Pressing F4 on your keyboard will select the client category that is above the one that you are currently on.

Next (F5)

There is no button associated with this function key. Pressing F5 on your keyboard will select the client category that is below the one that you are currently on.

Add Category (F6)

Clicking this button will go into add mode to allow you to add a new client category.

Edit Category (F7)

Clicking this button will go into edit mode so that you may edit the selected client category.

Deactivate Category (F8)

Clicking this button will mark the currently selected client category as deactivated. It will disappear from the Active Lookup unless you have Show All checked, in which case it will appear in red.

Exit (F3)

Clicking this button will close the Client Categories screen.

Save (F3) (when in add or edit mode)

Clicking this button will save your changes and return to browse mode.

Cancel (F9) (when in add or edit mode)

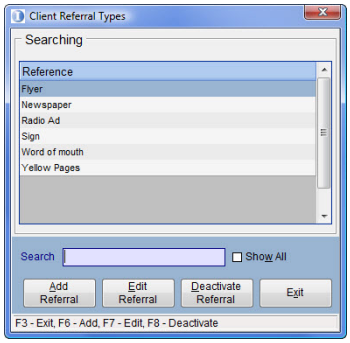
Clicking this button will cancel your changes and return to browse mode.

Client Referral Types

The information entered into this section of the program will allow you to determine how all of your new clients come to find out about your business. Any new advertising or marketing initiative that you attempt should be added in as a referral type so that as new clients come in, you can specify how they came in for the first time. You can then print reports that will show you how effective each different referral type is at attracting new customers.

How to Add a Referral Type

- Click on the Setup button on the Insight Menu Bar
- Click on Client Referral Types in the menu



- Click the Add Referral button or press F6 on your keyboard
- You will then see that the Search field disappears and you are able to enter a new Referral Type
- Type in the new name noting that you may not have more than one Referral Type with the same name
- Click the Save button or press F3 on your keyboard

Client Referral Types Reference

Client Referral Type grid

The grid is the main feature of this screen and contains all of your client referral types. The entire screen is essentially the Active Lookup for your client referral types. Please refer to the "Active Lookups" section on page 1 to learn how this feature is designed to be used. The only field (other than the Active Lookup Search field) that is available on this screen is the Referral Description field, which only appears in add or edit mode.

Function Buttons

The function buttons in the bottom right section of the screen allow you to perform the most common tasks for this screen. Most of the function buttons have an F-key associated with them that you can press on your keyboard instead of clicking the button with your mouse.

Previous (F4)

There is no button associated with this function key. Pressing F4 on your keyboard will select the client referral type that is above the one that you are currently on.

Next (F5)

There is no button associated with this function key. Pressing F5 on your keyboard will select the client referral type that is below the one that you are currently on.

Add Referral (F6)

Clicking this button will go into add mode to allow you to add a new client referral type.

Edit Referral (F7)

Clicking this button will go into edit mode so that you may edit the selected client referral type.

Deactivate Referral (F8)

Clicking this button will mark the currently selected client referral type as deactivated. It will disappear from the Active Lookup unless you have Show All checked, in which case it will appear in red.

Exit (F3)

Clicking this button will close the Client Referral Types screen.

Save (F3) (when in add or edit mode)

Clicking this button will save your changes and return to browse mode.

Cancel (F9) (when in add or edit mode)

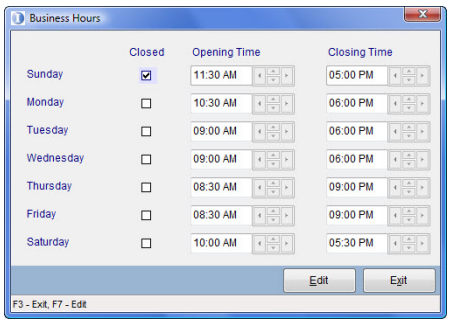
Clicking this button will cancel your changes and return to browse mode.

Business Hours

The Business Hours area is used to tell Insight what days your business is open and what hours you are open each of those days. While this information is primarily used by the Appointment Book, it is also used by some reports.

How to Set Up Your Business Hours

- Click on the Setup button on the Insight Menu Bar
- Click on Business Hours in the menu



- Click the Edit button or press F7 on your keyboard
- For each day of the week that you are open, click on the Closed checkbox to make sure it is unchecked
- For each day of the week that you are open, use the arrow buttons on each time field to set your opening and closing times

> ***NOTE: The Left arrow will set the time one hour earlier for each click while the Down arrow will set the time earlier by 15 minutes each click. The Right arrow will set the time one hour later for each click while the up arrow will set the time later by 15 minutes each click.***

- Click the Save button or press F3 on your keyboard

Business Hours Reference

Closed checkboxes

There is one checkbox for each day of the week. There should only be a checkmark in the field for days on which your business is closed.

Opening Time fields

The Opening Time must be set for each day of the week that you are not closed. Click on the up and down or left and right arrows to change the time. Be careful not to set the opening time later than the closing time, or your appointment book will not work correctly.

Closing Time fields

The Closing Time must be set for each day of the week that you are not closed. Click on the up and down or left and right arrows to change the time. Be careful not to set the opening time later than the closing time, or your appointment book will not work correctly.

Function Buttons

The function buttons in the bottom right section of the screen allow you to perform the most common tasks for this screen. Most of the function buttons have an F-key associated with them that you can press on your keyboard instead of clicking the button with your mouse.

Edit (F7)

Clicking this button will go into edit mode so that you may edit the business hours.

Exit (F3)

Clicking this button will close the Business Hours screen.

Save (F3) (when in edit mode)

Clicking this button will save your changes and return to browse mode.

Cancel (F9) (when in edit mode)

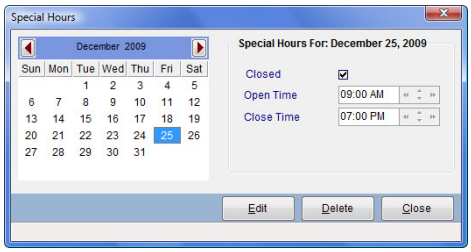
Clicking this button will cancel your changes and return to browse mode.

Public Holidays

The Public Holidays area is used to tell Insight what special days your business is closed or has unusual hours.

How to Set Up Your Special Holiday Hours

- Click on the Setup button on the Insight Menu Bar
- Click on Public Holidays in the menu



- Use the calendar to select the day for which you want to set up special hours
- If no special hours have been specified for the selected date, click the Add button to create them
- Click Edit to change the special hours for a date that already has them
- Click Delete to remove the special hours for the selected date
- Click on the Closed checkbox if you will just be closed for that day, otherwise use the arrow buttons on each time field to set your opening and closing times

> ***NOTE: The Left arrow will set the time one hour earlier for each click while the Down arrow will set the time earlier by 15 minutes each click. The Right arrow will set the time one hour later for each click while the up arrow will set the time later by 15 minutes each click.***

- Click the Close button when you are finished

Public Holidays Reference

Calendar

The calendar is used to select specific dates for which you will not be open for your usual hours.

Closed checkbox

This checkbox is used to specify that your business will be closed on the selected date.

Open Time field

The Open Time can be set for each day that you are not closed, but will have a different opening time than usual. Click on the up and down or left and right arrows to change the time. Be careful not to set the opening time later than the closing time, or your appointment book will not work correctly.

Close Time field

The Close Time can be set for each day that you are not closed, but will have a different closing time than usual. Click on the up and down or left and right arrows to change the time. Be careful not to set the opening time later than the closing time, or your appointment book will not work correctly.

Function Buttons

The function buttons in the bottom right section of the screen allow you to perform the most common tasks for this screen.

Add

Clicking this button will go into edit mode so that you may add new special hours.

Edit

Clicking this button will go into edit mode so that you may edit existing special hours.

Delete

Clicking this button will remove the special hours for the selected date.

Close

Clicking this button will close the Business Hours screen.

Save (when in edit mode)

Clicking this button will save your changes and return to browse mode.

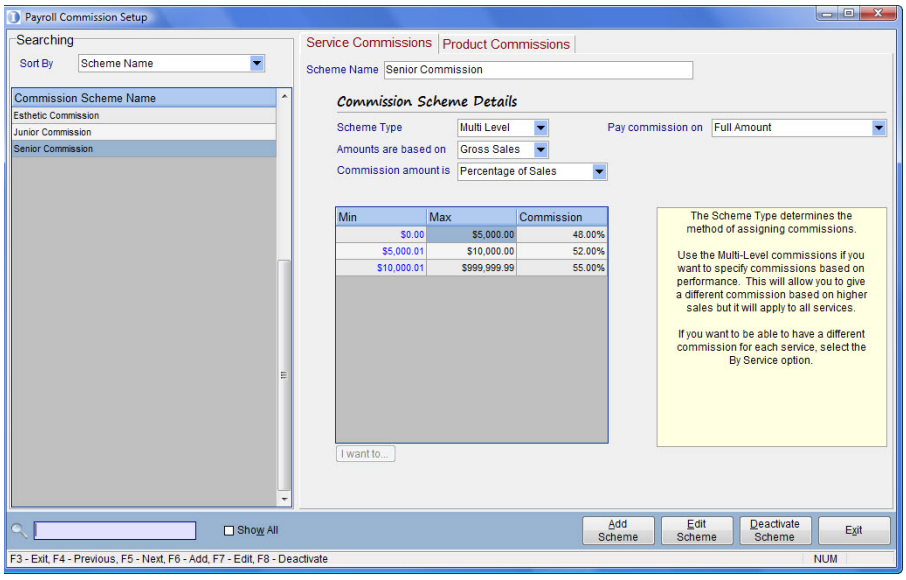
Cancel (when in edit mode)

Clicking this button will cancel your changes and return to browse mode.

Payroll Setup

What is a Commission Scheme?

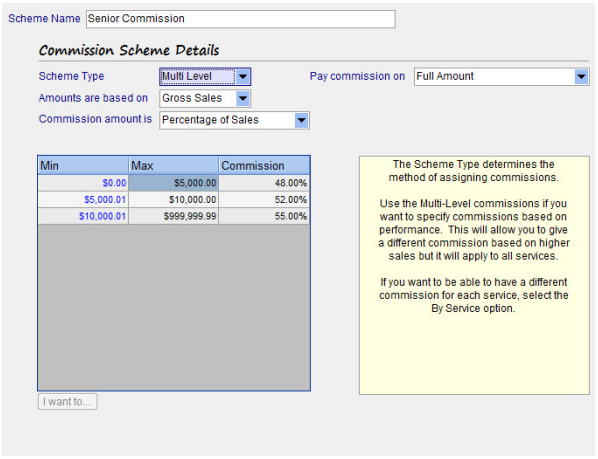
A Commission Scheme is something you can set up that is basically a 'formula' for how to calculate commissions for your employees. This is used when running payroll to figure the commissions for each employee based on their sales for the time period. In its simplest form, it is basically saying, 'for this type of employee, they will receive X percent of their sales totals in commission'. You can create as many different commission schemes as necessary, to assign them to different employees, if you have some people that are paid at different rates than others.



How to Add a Commission Scheme

- Click on the Setup button on the Insight Menu Bar
- Click on Payroll Setup in the menu
- If you want to add a commission scheme for product sales, click on the Product Commissions tab, otherwise stay on the Service Commissions tab
- Click the Add Scheme button or press F6 on your keyboard
- Enter a descriptive Scheme name

> ***TIP: As you move through the next few fields, a built-in help screen will give you valuable information about what each field means. Please read through each of these or refer to the Payroll Setup Reference section below for detailed information about each field.***



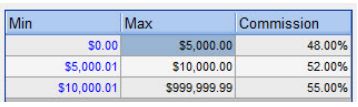
- Select the Scheme Type (Multi Level or By Service/Product)
- Select the appropriate “Pay commission on” option (Full Amount or Level Difference Only)
- Select the appropriate “Amounts are based on” option (Gross Sales or Net Profit)
- Select the appropriate “Commission amount is” option (Percentage of Sales or Flat Amount)
- If adding a Product Commission Scheme, select the appropriate “Sales level based on” option (Product Sales or Percent of Services Sold)
- Continue with the appropriate next section depending on the Scheme Type that you chose above

Multi Level Scheme Type

- If this will be a flat rate commission scheme, i.e. the same commission no matter what level of sales is achieved, then just type the commission amount into the Commission column in the grid
- If this commission scheme will pay out a different commission percentage depending on performance, then perform the following indented steps for each commission level you require:
  - Enter the amount required to reach the lowest commission level in the Max column and press Tab

    NOTE: As soon as you do this, a new line will appear in the grid with a Min value starting one penny higher than the number you just entered, and the Max value at one penny less than one million, which is the highest this column can be set to.

  - Enter the commission percentage or flat currency amount for this level in the Commission column (this can be zero if desired)
  - Move down to the next row in the grid and repeat the previous two steps for as many levels as you require



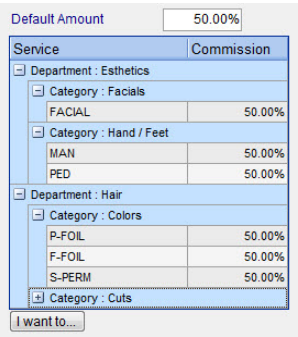
Min	Max	Commission
$0.00	$5,000.00	48.00%
$5,000.01	$10,000.00	52.00%
$10,000.01	$999,999.99	55.00%

- Click the Save button or press F3 on your keyboard

By Service/Product Scheme Type

- Enter the Default Amount of commission that you will pay for sales of most services or products and press Enter or Tab

NOTE: As soon as you do this, a list of all of your services or products will appear in the grid, grouped by department and category. Click the expand buttons (+) to open these up and display the actual services and products.



- Look through the list to find the services or products that you wish to pay a different amount of commission for than the default that you just entered and click into the Commission column for the service or product and change the amount
- Click the Save button or press F3 on your keyboard

Payroll Setup Reference

For an overview of the general purpose and function of commission schemes, please see the "What is a Commission Scheme?" section on page 283.

Active Lookup

The Active Lookup area in the left area of the screen is where you can search to find the commission scheme you wish to work with. Please refer to the "Active Lookups" section on page 1 to learn how this feature is designed to be used.

Service Commissions tab

Scheme Name

The Scheme Name must be unique and should be something you will easily recognize when you are selecting it from the list to assign to your employees on the Payroll Setup tab of the Employees screen.

Scheme Type

The Scheme Type determines the method of assigning commissions. Use the Multi-Level commissions if you want to specify commissions based on performance. This will allow you to give a different commission based on higher sales but it will apply to all services. If you want to be able to have a different commission for each service, select the By Service option.

Pay commission on ("Multi Level" Scheme Type only)

The Pay Commission level basis determines how commissions will be paid if you choose to give higher commissions for higher sales. If you choose Full Amount, then the commission percentage for the sales level attained will be paid for the employee's entire sales amount. If you choose Level Difference Only, then the first level commission will be paid on the sales amount up to the first level amount. Then the second level commission will be paid on only the difference from the first sales level amount to the second sales level amount, etc.

Amounts are based on

The commission Amounts basis determines how the commissions will be paid to the employee. If you choose Gross Sales, then commission will be paid on the entire retail price of the service. If you choose Net Profit, commission will be paid on the retail price of the service minus the calculated cost of that service. Taxes are not included in the calculation.

Commission amount is

This field determines whether the commission is calculated based on the Percentage of Sales or whether the employee is just given a Flat Amount for reaching the sales target.

Default Amount ("By Service" Scheme Type only)

This field is for the default commission amount that will be applied to all services for this commission scheme. Once this default has been applied, you will be able to change the commission on specific services if you wish.

Commission grid

The grid shows different information depending on which Scheme Type is selected for the commission scheme. Each option is discussed below.

Multi Level method

This grid gives you the ability to specify as many different ranges of sales as necessary and enter the desired Commission amount for each level. While some businesses pay out a specific commission regardless of the amount of sales, others use an escalating commission scale that rewards employees for attaining higher sales figures. The Min value in each level is calculated by Insight and will always represent 0.01 above the Max value of the previous level. As long as you continue to change the Max values, Insight will automatically add a new level with "999,999.99" in the Max to ensure that all really high sales figures will still fall within this last sales range level.

By Service method

You may enter different commissions for as many of your services for this commission scheme as you like. When payroll is calculated, any employees that have this commission scheme assigned to them will have their commissions calculated based on the individual commissions that are assigned to the services on this screen. Use the Enter key to edit the commission of the service that you have highlighted, and the arrow keys or mouse to move to different services in the list. Red text indicates that the service has been deactivated.

I want to… button

This button has a different function depending on which Scheme Type is selected for the commission scheme. Each option is discussed below.

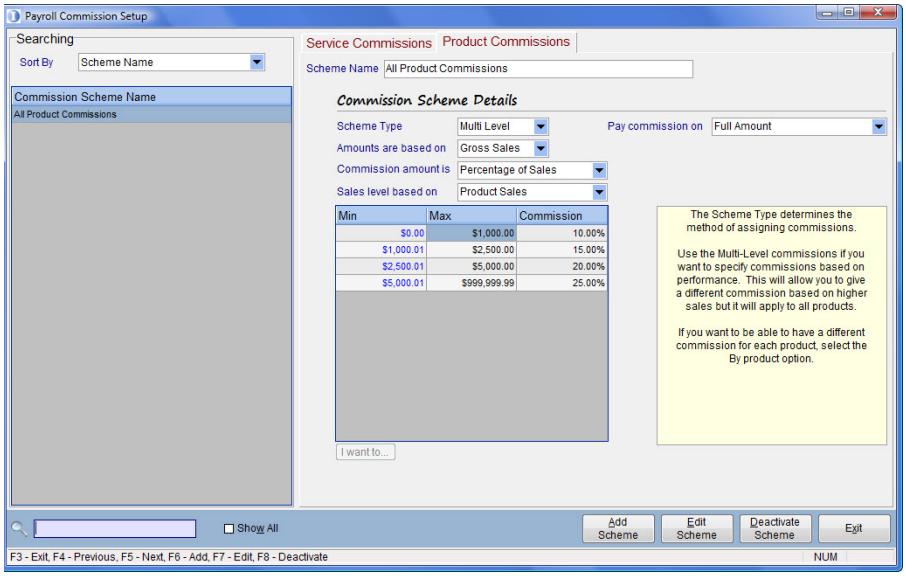
Multi Level method

For the Multi Level method, the option in this button will remove the currently selected commission level.

By Service method

For the By Service method, the option in this button will refresh the list of services. This will make sure that any new services that have been added since this commission scheme was created will appear.

Product Commissions tab



Scheme Name

The Scheme Name must be unique and should be something you will easily recognize when you are selecting it from the list to assign to your employees on the Payroll Setup tab of the Employees screen.

Scheme Type

The Scheme Type determines the method of assigning commissions. Use the Multi-Level commissions if you want to specify commissions based on performance. This will allow you to give a different commission based on higher sales but it will apply to all products. If you want to be able to have a different commission for each product, select the By Product option.

Pay commission on ("Multi Level" Scheme Type only)

The Pay Commission level basis determines how commissions will be paid if you choose to give higher commissions for higher sales. If you choose Full Amount, then the commission percentage for the sales level attained will be paid for the employee's entire sales amount. If you choose Level Difference Only, then the first level commission will be paid on the sales amount up to the first level amount. Then the second level commission will be paid on only the difference from the first sales level amount to the second sales level amount, etc.

Amounts are based on

The commission Amounts basis determines how the commissions will be paid to the employee. If you choose Gross Sales, then commission will be paid on the entire retail price of the product. If you choose Net Profit, commission will be paid on the retail price of the product minus the calculated cost of that product. Taxes are not included in the calculation.

Commission amount is

This field determines whether the commission is calculated based on the Percentage of Sales or whether the employee is just given a Flat Amount for reaching the sales target.

Sales level based on ("Multi Level" Scheme Type only)

This determines the type of sales range that will be used to calculate the commissions. If you choose Product Sales, then commission will be based strictly on the total value of products sales that the employee did for a given pay period. If you choose Percent of Services Sold, commission will be based on the amount of product sales as a percentage of the amount of service sales that the employee did for a given pay period.

Based on Service (Sales level based on "Percent of Services Sold" method only)

This determines how the product and service sales will be compared. If you choose Gross Sales, then sales will be compared on the entire retail price of the services. If you choose Net Profit, sales will be compared on the retail price of the services minus the calculated cost of the services. Taxes are not included in the calculation.

Default Amount ("By Product" Scheme Type only)

This field is for the default commission amount that will be applied to all products for this commission scheme. Once this default has been applied, you will be able to change the commission on specific products if you wish.

Commission grid

The grid shows different information depending on which Scheme Type is selected for the commission scheme. Each option is discussed below.

Multi Level method

This grid gives you the ability to specify as many different ranges of sales as necessary and enter the desired Commission amount for each level. While some businesses pay out a specific commission regardless of the amount of sales, others use an escalating commission scale that rewards employees for attaining higher sales figures. The Min value in each level is calculated by Insight and will always represent 0.01 above the Max value of the previous level. As long as you continue to change the Max values, Insight will automatically add a new level with "999,999.99" in the Max to ensure that all really high sales figures will still fall within this last sales range level.

By Product method

You may enter different commissions for as many of your products for this commission scheme as you like. When payroll is calculated, any employees that have this commission scheme assigned to them will have their commissions calculated based on the individual commissions that are assigned to the products on this screen. Use the Enter key to edit the commission of the product that you have highlighted, and the arrow keys or mouse to move to different products in the list. Red text indicates that the product has been deactivated.

I want to… button

This button has a different function depending on which Scheme Type is selected for the commission scheme. Each option is discussed below.

Multi Level method

For the Multi Level method, the option in this button will remove the currently selected commission level.

By Product method

For the By Product method, the option in this button will refresh the list of products. This will make sure that any new products that have been added since this commission scheme was created will appear.

Function Buttons

The function buttons in the bottom right section of the screen allow you to perform the most common tasks for this screen. Most of the function buttons have an F-key associated with them that you can press on your keyboard instead of clicking the button with your mouse.

Previous (F4)

There is no button associated with this function key. Pressing F4 on your keyboard will select the commission scheme that is above the one that you are currently on.

Next (F5)

There is no button associated with this function key. Pressing F5 on your keyboard will select the commission scheme that is below the one that you are currently on.

Add Scheme (F6)

Clicking this button will go into add mode to allow you to add a new commission scheme.

Edit Scheme (F7)

Clicking this button will go into edit mode so that you may edit the selected commission scheme.

Deactivate Scheme (F8)

Clicking this button will mark the currently selected commission scheme as deactivated. You will not be able to do this if any employee is currently using the scheme.

Exit (F3)

Clicking this button will close the Payroll Commission Setup screen.

Save (F3) (when in add or edit mode)

Clicking this button will save your changes and return to browse mode.

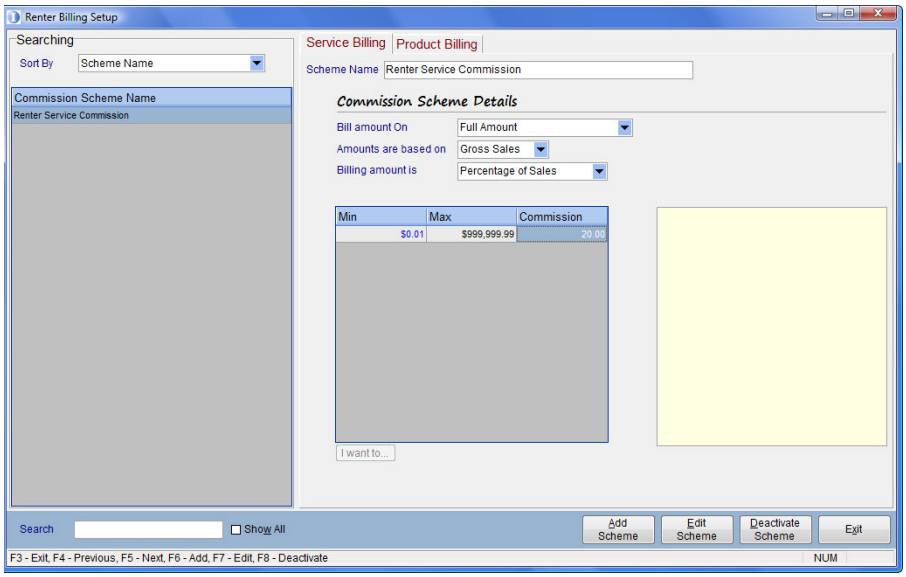
Cancel (F9) (when in add or edit mode)

Clicking this button will cancel your changes and return to browse mode.

Self-Employed Billing Setup

What is a Billing Commission Scheme?

A Billing Commission Scheme is something you can set up that is basically a 'formula' for how to calculate commissions to charge your renters. This is used when running the Self-Employed Billing to figure the commissions for each renter based on their sales for the time period. In its simplest form, it is basically saying, 'for this type of employee, they will be charged X percent of their sales totals in commission'. You can create as many different commission schemes as necessary, to assign them to different employees, if you have some people that are charged at different rates than others.

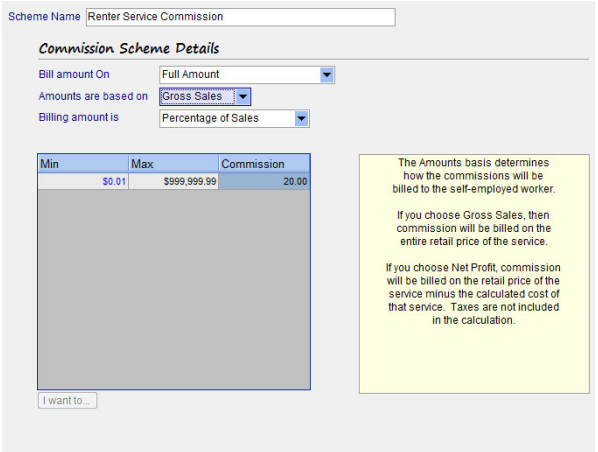


How to Add a Billing Commission Scheme

- Click on the Setup button on the Insight Menu Bar
- Click on Self-Employed Billing Setup in the menu
- If you want to add a commission scheme for product sales, click on the Product Billing tab, otherwise stay on the Service Billing tab
- Click the Add Scheme button or press F6 on your keyboard
- Enter a descriptive Scheme name

> ***TIP: As you move through the next few fields, a built-in help screen will give you valuable information about what each field means. Please read through each of these or refer to the Self-Employed Billing Setup Reference section below for detailed information about each field.***

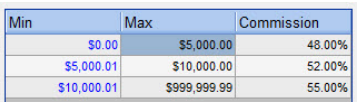
- Select the appropriate "Bill amount on" option (Full Amount or Level Difference Only)


Scheme Name
Renter Service Commission
Commission Scheme Details
Bill amount On
Full Amount
Amounts are based on
Gross Sales
Billing amount is
Percentage of Sales
Min
Max
Commission
$0.01
$999,999.99
20.00
The Amounts basis determines how the commissions will be billed to the self-employed worker.
If you choose Gross Sales, then commission will be billed on the entire retail price of the service.
If you choose Net Profit, commission will be billed on the retail price of the service minus the calculated cost of that service. Taxes are not included in the calculation.
I want to...

- Select the appropriate “Amounts are based on” option (Gross Sales or Net Profit)
- If you are entering a Product billing scheme and select Net Profit, you can choose to bill the commission on the net profit plus the product cost by clicking the Bill commission PLUS cost checkbox that appears
- Select the appropriate “Billing amount is” option (Percentage of Sales or Flat Amount)
- If adding a Product Billing Commission Scheme, select the appropriate “Sales level based on” option (Product Sales or Percent of Services Sold)
- If this will be a flat rate commission scheme, i.e. the same commission no matter what level of sales is achieved, then just type the commission amount into the Commission column in the grid
- If this commission scheme will charge a different commission percentage depending on performance, then perform the following indented steps for each commission level you require:
  - Enter the amount required to reach the lowest commission level in the Max column and press Tab

    NOTE: As soon as you do this, a new line will appear in the grid with a Min value starting one penny higher than the number you just entered, and the Max value at 0.01 less than one million, which is the highest this column can be set to.

  - Enter the commission percentage or flat currency amount for this level in the Commission column (this can be zero if desired)
  - Move down to the next row in the grid and repeat the previous two steps for as many levels as you require



Min	Max	Commission
$0.00	$5,000.00	48.00%
$5,000.01	$10,000.00	52.00%
$10,000.01	$999,999.99	55.00%

- Click the Save button or press F3 on your keyboard

Self-Employed Billing Setup Reference

For an overview of the general purpose and function of commission schemes, please see the “What is a Billing Commission Scheme?” section on page 289.

Active Lookup

The Active Lookup area in the left area of the screen is where you can search to find the commission scheme you wish to work with. Please refer to the “Active Lookups” section on page 1 to learn how this feature is designed to be used.

Service Billing tab

Scheme Name

The Scheme Name must be unique and should be something you will easily recognize when you are selecting it from the list to assign to your employees on the Self-Employment Setup tab of the Employees screen.

Bill amount on

The Bill Amount level basis determines how commissions will be billed if you choose to charge higher commissions for higher sales. If you choose Full Amount, then the commission percentage for the sales level attained will be billed for the associate's entire sales amount. If you choose Level Difference Only, then the first level commission will be billed on the sales amount up to the first level amount. Then the second level commission will be billed on only the difference from the first sales level amount to the second sales level amount, etc.

Amounts are based on

The Amounts basis determines how the commissions will be paid to the self-employed worker. If you choose Gross Sales, then commission will be billed on the entire retail price of the service. If you choose Net Profit, commission will be billed on the retail price of the service minus the calculated cost of that service. Taxes are not included in the calculation.

Billing amount is

This field determines whether the commission is calculated based on the Percentage of Sales or whether the associate is just billed a Flat Amount for reaching the sales target.

Commission grid

This grid gives you the ability to specify as many different ranges of sales as necessary and enter the desired Commission amount for each level. While some businesses bill a specific commission regardless of the amount of sales, others use an sliding commission scale that rewards employees for attaining higher sales figures. The Min value in each level is

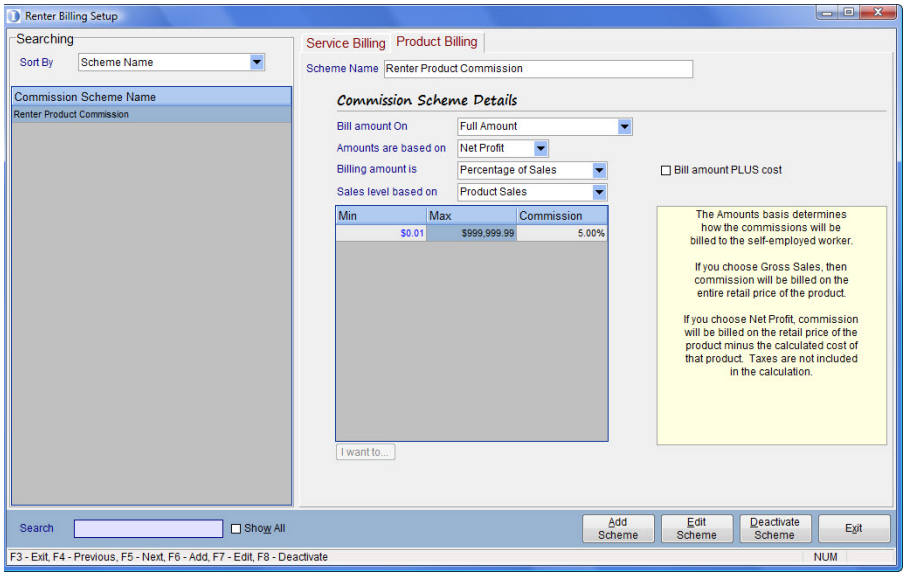
calculated by Insight and will always represent 0.01 above the Max value of the previous level. As long as you continue to change the Max values, Insight will automatically add a new level with “999,999.99” in the Max to ensure that all really high sales figures will still fall within this last sales range level.

I want to… button

Remove this commission level

This option will remove the currently selected commission level.

Product Billing tab


Renter Billing Setup
Searching
Sort By
Scheme Name
Commission Scheme Name
Renter Product Commission
Service Billing
Product Billing
Scheme Name
Renter Product Commission
Commission Scheme Details
Bill amount On
Full Amount
Amounts are based on
Net Profit
Billing amount is
Percentage of Sales
Sales level based on
Product Sales
Bill amount PLUS cost
Min
Max
Commission
$0.01
$999,999.99
5.00%
The Amounts basis determines how the commissions will be billed to the self-employed worker.
If you choose Gross Sales, then commission will be billed on the entire retail price of the product.
If you choose Net Profit, commission will be billed on the retail price of the product minus the calculated cost of that product. Taxes are not included in the calculation.
I want to...
Search
Show All
Add Scheme
Edit Scheme
Deactivate Scheme
Exit
F3 - Exit, F4 - Previous, F5 - Next, F6 - Add, F7 - Edit, F8 - Deactivate
NUM

Scheme Name

The Scheme Name must be unique and should be something you will easily recognize when you are selecting it from the list to assign to your employees on the Self-Employment Setup tab of the Employees screen.

Bill amount on

The Bill Amount level basis determines how commissions will be billed if you choose to charge higher commissions for higher sales. If you choose Full Amount, then the commission percentage for the sales level attained will be billed for the associate's entire sales amount. If you choose Level Difference Only, then the first level commission will be billed on the sales amount up to the first level amount. Then the second level commission will be billed on only the difference from the first sales level amount to the second sales level amount, etc.

Amounts are based on

The Amounts basis determines how the commissions will be paid to the self-employed worker. If you choose Gross Sales, then commission will be billed on the entire retail price of the product. If you choose Net Profit, commission will be billed on the retail price of the service minus the calculated cost of that product. Taxes are not included in the calculation.

Billing amount is

This field determines whether the commission is calculated based on the Percentage of Sales or whether the associate is just billed a Flat Amount for reaching the sales target.

Bill amount PLUS cost

This checkbox will appear if you have selected Net Profit for the “Amounts are based on” option. This allows you to charge the cost of the product plus the commission on the net sales.

Sales level based on

This determines the type of sales range that will be used to calculate the commissions. If you choose Product Sales, then commission will be based strictly on the total value of products sales that the employee did for a given pay period. If you choose Percent of Services Sold, commission will be based on the amount of product sales as a percentage of the amount of service sales that the employee did for a given pay period.

Based on Service (Sales level based on “Percent of Services Sold” method only)

This determines how the product and service sales will be compared. If you choose Gross Sales, then sales will be compared on the entire retail price of the services. If you choose Net Profit, sales will be compared on the retail price of the services minus the calculated cost of the services. Taxes are not included in the calculation.

Commission grid

This grid gives you the ability to specify as many different ranges of sales as necessary and enter the desired Commission amount for each level. While some businesses bill a specific commission regardless of the amount of sales, others use an sliding commission scale that rewards employees for attaining higher sales figures. The Min value in each level is calculated by Insight and will always represent 0.01 above the Max value of the previous level. As long as you continue to change the Max values, Insight will automatically add a new level with “999,999.99” in the Max to ensure that all really high sales figures will still fall within this last sales range level.

I want to… button

Remove this commission level

This option will remove the currently selected commission level.

Function Buttons

The function buttons in the bottom right section of the screen allow you to perform the most common tasks for this screen. Most of the function buttons have an F-key associated with them that you can press on your keyboard instead of clicking the button with your mouse.

Previous (F4)

There is no button associated with this function key. Pressing F4 on your keyboard will select the commission scheme that is above the one that you are currently on.

Next (F5)

There is no button associated with this function key. Pressing F5 on your keyboard will select the commission scheme that is below the one that you are currently on.

Add Scheme (F6)

Clicking this button will go into add mode to allow you to add a new commission scheme.

Edit Scheme (F7)

Clicking this button will go into edit mode so that you may edit the selected commission scheme.

Deactivate Scheme (F8)

Clicking this button will mark the currently selected commission scheme as deactivated. You will not be able to do this if any employee is currently using the scheme.

Exit (F3)

Clicking this button will close the Self-Employed Billing Setup screen.

Save (F3) (when in add or edit mode)

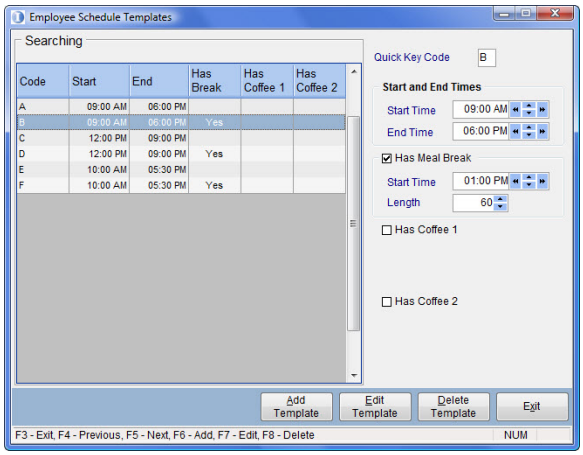
Clicking this button will save your changes and return to browse mode.

Cancel (F9) (when in add or edit mode)

Clicking this button will cancel your changes and return to browse mode.

Schedule Templates

The Schedule Template utility allows you to set up common working schedule to a single "Quick-Key" to help make scheduling each of your employees much quicker. For example, one of your more popular schedules may be 9:00am – 6:00pm with a 1 hour meal break starting at 1:00pm. You could set this up and assign it the "Quick-Key" of A. When you move on to the task of scheduling each of your Employees, whenever you get to a day where the selected employee works those hours, all you have to do is press the A key on the keyboard and that entire schedule will be copied into that day.



How to Add a Schedule Template

- Click on the Setup button on the Insight Menu Bar
- Click on Schedule Templates in the menu
- Click the Add Template button or press F6 on your keyboard
- Assign the Quick Key Code you wish to use for this template

> ***NOTE: This code must be only one character long so you are limited to the letters of the alphabet or single digit numbers***

- Use the arrow buttons on each time field to set your Start and End times

> ***NOTE: The Left arrow will set the time one hour earlier for each click while the Down arrow will set the time earlier by 15 minutes each click. The Right arrow will set the time one hour later for each click while the up arrow will set the time later by 15 minutes each click.***

- Click on the checkbox for each Meal or Coffee break that you want to include in this schedule
- Use the arrow buttons to set the Start Time and Length for each break
- Click the Save button or press F3 on your keyboard

Schedule Templates Reference

Schedule Templates grid

This grid is essentially the Active Lookup for your schedule templates, except that there is no Search field. Please refer to the "Active Lookups" section on page 1 to learn how this feature is designed to be used.

Quick Key Code

This field is for the single key that identifies the selected schedule template when you are scheduling your employees. This code can be any number or letter on the keyboard, which will allow you to set up a maximum of 36 templates. If you try to select a code that is already being used, Insight will not allow you to continue.

Has Meal Break, Has Coffee 1, Has Coffee 2

Check each one of these checkboxes that applies for the schedule you are creating or editing. You can have a meal break and up to two coffee breaks for each day. When you check each of these, their associated time and/or length fields will appear for you to fill in. If additional breaks are needed, you can book "Special Breaks" directly on the appointment book screen. See the "Book Special Break" section on page 50 for more information.

Start Time and End Time

You can click on the arrow buttons for these fields to change the time. The left and right arrows will move the time down or up by one hour. The up and down arrows will move the time up or down by fifteen minutes. You can also use the arrow keys on your keyboard to change the time once you have clicked into the field. The Start Times for the meal and coffee breaks are initially set to somewhat logical times by Insight. For example, if the schedule runs from 8am to 5pm, when you click on the Has Meal Break checkbox, the Start Time is initialized to 12:30pm, approximately half-way through the shift.

Length

These fields set the length of time for meal and coffee breaks. The shortest these breaks can be is fifteen minutes. They can be set in fifteen minute increments, using the up and down arrow buttons or keys.

Function Buttons

The function buttons in the bottom right section of the screen allow you to perform the most common tasks for this screen. Most of the function buttons have an F-key associated with them that you can press on your keyboard instead of clicking the button with your mouse.

Previous (F4)

There is no button associated with this function key. Pressing F4 on your keyboard will select the schedule template that is above the one that you are currently on.

Next (F5)

There is no button associated with this function key. Pressing F5 on your keyboard will select the schedule template that is below the one that you are currently on.

Add Template (F6)

Clicking this button will go into add mode to allow you to add a new schedule template.

Edit Template (F7)

Clicking this button will go into edit mode so that you may edit the selected schedule template.

Delete Template (F8)

Clicking this button will delete the currently selected schedule template.

Exit (F3)

Clicking this button will close the Schedule Templates screen.

Save (F3) (when in add or edit mode)

Clicking this button will save your changes and return to browse mode.

Cancel (F9) (when in add or edit mode)

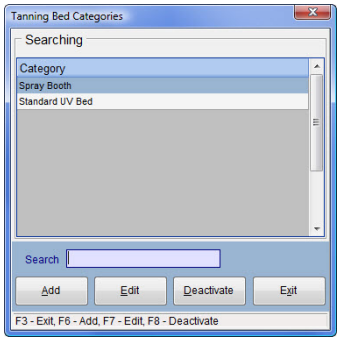
Clicking this button will cancel your changes and return to browse mode.

Tanning Bed Categories

Using these categories gives you a way to group your tanning beds or booths. We highly recommend setting up a category for each of your tanning beds so those that are similar can be grouped and compared in various reports and the appointment book. There are a number of reports that give you the option to use the category to filter for a smaller group of your tanning beds rather than having them all show up.

How to Add a Tanning Bed Category

- Click on the Setup button on the Insight Menu Bar
- Click on Tanning Bed Categories in the menu



- Click the Add Category button or press F6 on your keyboard
- You will then see that the Search field disappears and you are able to enter a new Category
- Type in the new name noting that you may not have more than one Category with the same name

> ***TIP: There are many different ways you may choose to categorize your tanning beds or booths. Two examples that we used in the Insight test data are "Spray Booth" and "Standard UV Bed". You might like to get much more specific than that depending on the types of tanning services that you offer.***

- Click the Save button or press F3 on your keyboard

Tanning Bed Categories Reference

Tanning Bed Category grid

The grid is the main feature of this screen and contains all of your tanning bed categories. The entire screen is essentially the Active Lookup for your tanning bed categories. Please refer to the "Active Lookups" section on page 1 to learn how this feature is designed to be used. The only field (other than the Active Lookup Search field) that is available on this screen is the Category Description field, which only appears in add or edit mode.

Function Buttons

The function buttons in the bottom right section of the screen allow you to perform the most common tasks for this screen. Most of the function buttons have an F-key associated with them that you can press on your keyboard instead of clicking the button with your mouse.

Previous (F4)

There is no button associated with this function key. Pressing F4 on your keyboard will select the tanning bed category that is above the one that you are currently on.

Next (F5)

There is no button associated with this function key. Pressing F5 on your keyboard will select the tanning bed category that is below the one that you are currently on.

Add Category (F6)

Clicking this button will go into add mode to allow you to add a new tanning bed category.

Edit Category (F7)

Clicking this button will go into edit mode so that you may edit the selected tanning bed category.

Delete Category (F8)

Clicking this button will delete the currently selected tanning bed category.

Exit (F3)

Clicking this button will close the Tanning Bed Categories screen.

Save (F3) (when in add or edit mode)

Clicking this button will save your changes and return to browse mode.

Cancel (F9) (when in add or edit mode)

Clicking this button will cancel your changes and return to browse mode.

Tanning Bed Setup

Each tanning bed or booth that you use must be entered into Insight so that you can book appointments for it in the appointment book. Tanning beds are similar to employees in that you book appointments with them and you need to specify which tanning services can be performed with each one.

How to Add a Tanning Bed

- Click on the Setup button on the Insight Menu Bar
- Click on Tanning Bed Setup in the menu
- Click the Add Bed button or press F6 on your keyboard
- Enter the Bed Name (this must be unique)
- Enter an ID Code (this must be unique)

> ***TIP: We recommend using an abbreviation of the Bed Name for the ID Code field***

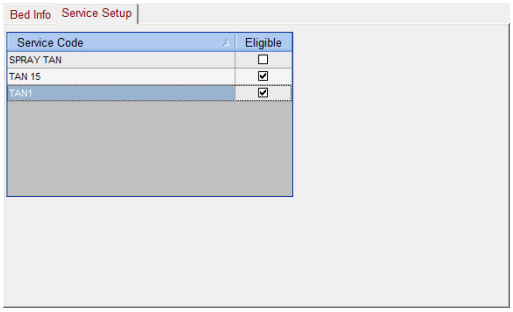
- Enter the Category or click the Lookup button to select it from the list

- Make sure that the “Has Tanning Bulbs” checkbox is checked off if this is a UV bed
- If you know the date, you can select the Bulbs Last Replaced date by clicking the arrow button in that field
- If you know how long the bulbs for this bed last, enter the Bulb Life in Hours
- If you know how long the bulbs have already been used, enter the Hours Used
- If there is a maximum amount of time someone is allowed to spend in this bed, select the Max Tan Duration (this is in minutes)
- Select the Lead In Time (in minutes) to specify how long to allow a client from the time they go to change to the time that the bed is actually turned on
- Select the Clean Up Time (in minutes) to specify how long to allow for clean up of the bed after the client has left before it can be used again for another client
- Click Save or press F3 on your keyboard

How to Set Which Tanning Services each Tanning Bed can Perform

NOTE: This is something you will want to make sure that you have set up properly in order to reduce errors on the appointment book. It will ensure that only tanning beds that are set up to perform certain services can be booked with them.

- Click on the Setup button on the Insight Menu Bar
- Click on Tanning Bed Setup in the menu
- Use the Active Lookup to find the tanning bed you wish to set up the services for
- Click on the Service Setup tab
- Click the Edit Eligibility button or press F7 on your keyboard

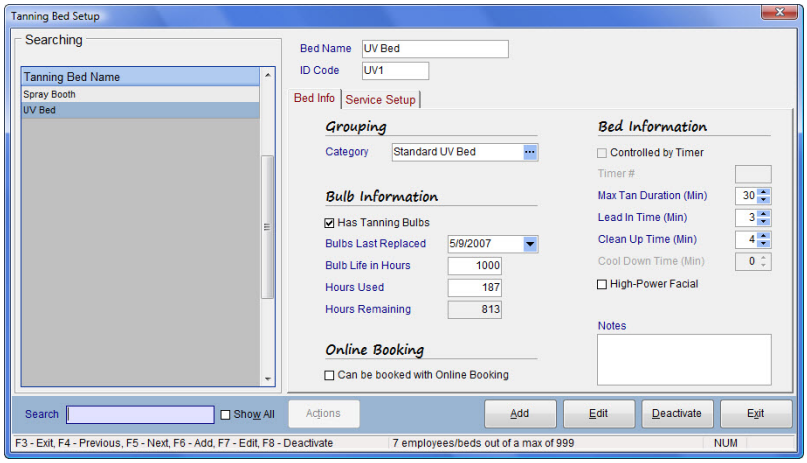


- For each service in the list, perform the following steps
  - Click on the service in the grid
  - Check or uncheck the Eligible checkbox depending on whether or not this bed can perform the service

TIP: You can speed up this process by selecting more than one service at the same time. You can select several or all of your services at once by clicking the first one in the list, then holding down the Shift or Ctrl key on your keyboard and then clicking on the last service in the list (or that you want to give access to). Let go of the Shift key and Insight will show you how many services you have selected and give you two buttons to either set or take away the eligibility for the current tanning bed. Click the appropriate button and Insight will automatically set the eligibility for all of the selected services.

- Click Done or press F3 on your keyboard

Tanning Bed Setup Reference



Active Lookup

The Active Lookup area in the left area of the screen is where you can search to find the tanning bed you wish to work with. Please refer to the "Active Lookups" section on page 1 to learn how this feature is designed to be used.

Bed Name

This is the name for the tanning bed/booth, and is what you will see on the Appointment Book screen. So, it should be something fairly brief so that it is recognizable, and must be unique.

ID Code

The ID Code field is used as an abbreviation for each tanning bed. This field can contain 1-8 characters that identify each of your tanning beds. You must specify a unique ID Code for each tanning bed that you add into Insight and you will not be allowed to save the information until a unique ID Code is entered.

Bed Info tab

Category

This field gives you a way of classifying your tanning beds according to their main function in your business. Categories are used in reports so it is very important to assign all of your tanning beds a Category.

Has Tanning Bulbs

If the selected bed uses actual bulbs (as opposed to a spray booth), you can check this field.

Bulbs Last Replaced

This field can be used to keep track of the last time that the bulbs in the tanning bed were replaced.

Bulb Life in Hours

This field is for the normal bulb life of the bulbs used for the selected tanning bed.

Hours Used

This field can be used to track how many hours have been used on the current bulbs in the tanning bed.

Hours Remaining

This field is automatically calculated from the Bulb Life in Hours minus the Hours Used. The bulbs should be replaced when or before this number reaches zero.

Max Tan Duration (Min)

This is for the maximum amount of time permitted for someone to tan in this bed. This is a safety precaution to make sure that no one spends longer than they should in a UV bed and risk skin damage.

Lead In Time (Min)

This field is for the amount of time it takes from the client checking in until they are in the bed/booth ready for their tanning to begin. It allows time for the client to change and get comfortable before their service begins. This amount of time is automatically added to the length of the tanning service when booked on the appointment book.

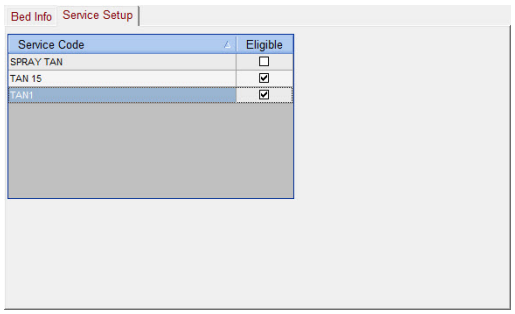
Clean Up Time (Min)

This field is for the amount of time needed to prepare the bed/booth for the next client once the previous client has finished their tanning. This amount of time is automatically added to the length of the tanning service when booked on the appointment book.

Notes

This field is for any relevant notes about the tanning bed/booth.

Service Setup tab



Tanning Service grid

This grid lists all of your tanning services. For each bed/booth, you must go through this list and check the Eligible checkbox for each service that can be provided using the selected bed/booth. This will ensure there are no mistakes made on the appointment book such as someone booking a spray tan service in a UV tanning bed.

Function Buttons

The function buttons in the bottom right section of the screen allow you to perform the most common tasks for this screen. Most of the function buttons have an F-key associated with them that you can press on your keyboard instead of clicking the button with your mouse.

Previous (F4)

There is no button associated with this function key. Pressing F4 on your keyboard will select the tanning bed that is above the one that you are currently on.

Next (F5)

There is no button associated with this function key. Pressing F5 on your keyboard will select the tanning bed that is below the one that you are currently on.

Add Bed (F6)

Clicking this button will go into add mode to allow you to add a new tanning bed.

Edit Bed (F7)

Clicking this button will go into edit mode so that you may edit the selected tanning bed.

Deactivate Bed (F8)

Clicking this button will mark the currently selected commission scheme as deactivated. It will disappear from the Active Lookup unless you have Show All checked, in which case it will appear in red.

Exit (F3)

Clicking this button will close the Tanning Bed Setup screen.

Save (F3) (when in add or edit mode)

Clicking this button will save your changes and return to browse mode.

Cancel (F9) (when in add or edit mode)

Clicking this button will cancel your changes and return to browse mode.

QuickBooks Integration

How to Set Up QuickBooks Integration in Insight

Before you can set up which accounts Insight will use in QuickBooks, you will need to do the following steps to turn on QuickBooks Integration in Insight. There is a cost for upgrading to QuickBooks Integration. For more information please contact your sales representative.

Activating the QuickBooks Integration Module

- Click on the Setup button on the Insight Menu Bar
- Click on Company Information in the menu
- Click the "QuickBooks Integration" checkbox
- Click the Save button or press F3 on your keyboard

NOTE: You will be prompted that if you continue you will have fifteen (15) days to contact Insight support and get your modification code. This MUST be done or you will lose the ability to add or edit information in Insight.

Preparing QuickBooks

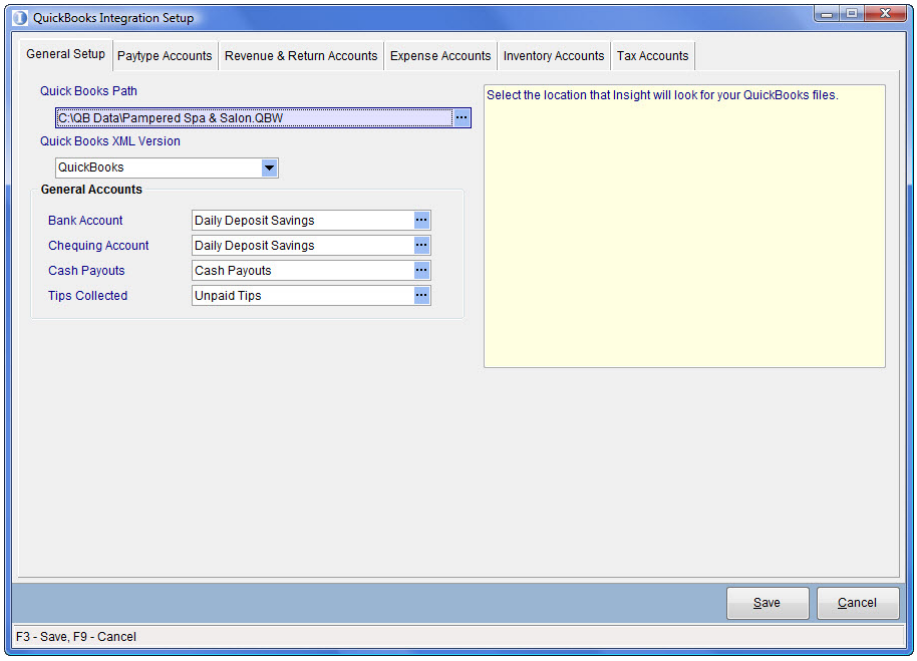
Next, you will need to be logged into QuickBooks and have it running, with your company information file open, and in Multi-user mode. To switch to multi-user mode, select File -> Switch to Multi-user Mode from the menu.

Connecting From Insight

- Click on the Setup button on the Insight Menu Bar
- Click on QuickBooks Integration in the menu
- Click OK on the reminder that you need to select a QuickBooks Company file
- Click the Edit button
- Click the Lookup button on the QuickBooks Path field and navigate to where your Company file is saved

TIP: In most cases this will be "C:\Program Files\Intuit\QuickBooks 200?\Your_Company_File.QBW"

- Click the OK button and Insight will then try to connect to QuickBooks



Granting Permission to Insight

If Insight is successful in connecting to QuickBooks, you will be prompted by QuickBooks to either accept or deny Insight's request to connect. There are four different choices that you can pick from.

No

This option will not allow Insight to connect to QuickBooks. Answering this way defeats the idea of QuickBooks Integration in Insight.

Yes, prompt each time

This option gives you the most control over if and when Insight can connect to QuickBooks. However, you will likely be prompted many times depending on what you are doing. This option requires you to be running QuickBooks when you do anything in Insight that requires QuickBooks Integration.

Yes, whenever this QuickBooks company file is open

This option gives you some control, but also lets Insight do what it needs to do without asking permission for each step it needs to do. This option requires that you have QuickBooks open and have this Company file open when you use the QuickBooks Integration areas of Insight.

Yes, always; allow access even if QuickBooks is not running

This is the option that we most recommend. If you are concerned about certain areas or information being accessed, you can set up a login and give it permission to do only the things you are comfortable with it doing. However, if any of these areas are needed by Insight to post your Daily Sales information, QuickBooks Integration may not be able to work properly. You do *not* need to have QuickBooks running when you use the QuickBooks Integration areas of Insight.

> ***NOTE: Depending on the option that you choose you may or may not have to do this section again.***

QuickBooks Canadian Editions

If you are using QuickBooks Canadian Edition, especially an earlier version than 2006, you may need to grant Insight access to log into QuickBooks when QuickBooks is not running. To do this:

- Open the company file in Single User Mode.
- Select Edit -> Preferences from the Menu
- Choose “Integrated Applications” from the list on the left
- Go to the Company Preference tab
- Select Insight from the list and click on the Properties button
- Click the “Allow this application to login automatically” checkbox and select the account that it should use when logging in
- Click on the Save button and close the preferences

Choosing QuickBooks Accounts

For the QuickBooks Integration to work properly, Insight needs to be told what information belongs in which accounts. See the “Setting Up Accounts in QuickBooks” section below for information on setting up your accounts in QuickBooks.

- Click on the Setup button on the Insight Menu Bar
- Click on QuickBooks Integration in the menu
- Click the Edit button or press F7 on your keyboard
- Click on each tab page on the screen and fill in each field as per the next step
- For each field, click the Lookup button to select the appropriate QuickBooks account from the list

> ***TIP: When you are in a field, a hint will be displayed on the right hand side to give you some information on which account to select.***

- Click the Save button or press F3 on your keyboard when you are finished

Special Considerations

Cash Payouts

An account is needed in which to record Cash Payouts by default. When actually posting your Daily Sales information, another account may be selected for each Cash Payout so that you can more accurately track where the money is going. However, since not everyone will want to track the information to this degree, Insight needs to know to which account Cash Payouts will go. This account should be a general “Expense” account from QuickBooks.

Setting Up Accounts in QuickBooks

NOTE: These instructions were based on QuickBooks 2006. Different versions may vary from these instructions. Syntec Business Systems, Inc. is not responsible for differences that you may encounter, or for providing technical support on how to use QuickBooks.

There are some basic accounts that everyone will need to have set up in QuickBooks. This document will outline each of them, what kind of account they should be, and their purpose. To view your list of accounts in QuickBooks, select Lists -> Chart of Accounts from the menu. This will bring up a list of your current accounts.

NOTE: These accounts do not necessarily all correspond to an actual Bank Account.

Required Accounts

Certain accounts are required in QuickBooks for Insight to be able to properly post Daily Sales information into QuickBooks. These accounts cover all of the basic, and most of the advanced, situations that your business will handle.

How to add an Account

This section will explain the steps to follow to create an account in QuickBooks. This procedure is the same for each type of account that you will need to create.

- Select Lists -> Chart of Accounts from the menu
- Click the Account button and select New
- From the Type dropdown, select the type of account that you are adding
- Enter the name of the account. You can also enter in a description if you would like
- If the account is a sub-account, check the "Sub-account" check box and select the main account from the dropdown list
- Fill out any other information that you know such as Bank Account number, etc.
- Click the OK button to save, or the Next button to save and start adding another account

Bank Accounts

You will have to set up at least one "Bank" account in QuickBooks. These accounts represent actual accounts you have at a bank. In a simple setup you will only need one account. All cash, checks, direct deposit, and credit cards would go into this account. All checks would be written from this account as well.

In a more complex setup, you can set up a sub-account for each deposit type that Insight tracks. Insight currently tracks the following deposits: Cash and Checks, Visa, Master Card, American Express, and Discover. Setting up sub-accounts for each deposit type that goes into the physical bank account will make it easier to reconcile with the Insight reports and your Merchant Provider's deposits by showing you only deposits of that particular type. For example, if you created a Visa Deposits sub-account, it would show only the amounts that were deposited from Visa transactions so you would not have to look through the whole list to match up a Visa statement from your Merchant Provider.

Income Accounts

Income Accounts let you record the earned revenues of your business. In a simple setup, only one Income account is needed. All of the income from various sources is record in one place, giving you just one total. However, we highly recommend a slightly more robust setup that will allow you to easily identify the income from different areas of your business; primary product income and services income. We suggest that you create two separate accounts; one for product sales and one for service sales.

Expense Accounts

Expense accounts let you track the costs you incur while doing business. These expenses will include Coupons, Discounts, Promotional Gift Certificates, and Shortages/Overages. Coupons, Discounts, and Promotional Gift Certificates can all be placed into the same account in QuickBooks as they are all, in essence, a discount that you give to your customers. However it may be useful to some businesses to know exactly how much they are spending in each of these areas. If this is the case with your business we would recommend creating separate accounts for each of them.

Promotional Gift Certificates occur when you sell a gift certificate for less than the value of that gift certificate. For example, you offer a deal where if your customer buys a 100.00 gift certificate you will only charge them 90.00. The extra 10.00 counts as a Promotional Gift Certificate.

Shortages and Overages are an unfortunate but common occurrence when dealing with money. People miscount change, mistype amounts, or drop loose change. These things can cause the amount that you count in your cash drawer to be different than the amounts that Insight calculates should be there. In QuickBooks, every entry must be balanced properly. If you have 100.00 in service sales, there needs to be 100.00 in money. If someone miscounted change and there is only 99.85 in your drawer, when those numbers are posted to QuickBooks, the extra 0.15 must go somewhere. A Shortages/Overages expense account is charged for the 0.15 and the entry can now be balanced. Because of the unique nature of this account, we highly recommend that these expenses be put in their own account.

Current Liability Accounts

Liability accounts record the amount of money that is owed to someone else. Typically these will include Gift Certificates, Tanning Packages, and Service Series Cards that have been paid for, but not redeemed. They will also include an account for tips that were collected but have not yet been paid. While you can create just one Liability Account for all of these, we suggest that you create a minimum of two accounts, one for Tips Collected and one for all the others. For the most detailed information, you can create an account for each of the items listed above. These accounts *must* be an "Other Current Liability" account.

> ***NOTE: We know that your first instinct might be to make this an "Accounts Payable" account type. However, QuickBooks requires that a Vendor be supplied when doing a transaction with an "Accounts Payable" account. Since there is no Vendor involved, we need to use the "Other Current Liability" type.***

Current Asset Accounts

Asset accounts record how much you own, or is owed to you. In Insight, these are generally cash or checks which have not be deposited and On Account purchases. QuickBooks automatically creates an account called "Undeposited Funds" for you. This account can be used for both the cash on hand and checks account. However, we recommend keeping two different accounts for cash on hand and checks because, after cashing out your cash drawers, the cash on hand account should give you an accurate picture of how much money is at the business including all cash drawers.

For most businesses, a single account for On Account payments will be enough. For those businesses that allow employees to make purchases on account as well, we suggest that you create two different accounts, or sub-accounts, one for clients and one for employees so that they can be tracked separately.

> ***NOTE: We know that your first instinct might be to make this an "Accounts Payable" account type. However, QuickBooks requires that a Vendor be supplied when doing a transaction with an "Accounts Payable" account. Since there is no Vendor involved, we need to use the "Other Current Liability" type.***

"Other" Payments

The "Other" Payments account is one that will require the most input from your Accountant. We find that some businesses accept payments that are not currently trackable in Insight. These can range from Hotel/Resort room keys to Membership cards. Therefore the account type required can change dramatically from business to business. In *most* cases this will be an "Other Current Asset" or an "Expense" account. Do *not* make this an "Accounts Payable" or an "Accounts Receivable" account type.

> ***NOTE: Accounts Payable and Accounts Receivable account types in QuickBooks require that a Vendor or Client, respectively, be supplied for each transaction that involves them. Entering every client that your business has as a separate entity within QuickBooks would be both time-consuming and tedious. Using either a "Other Current Liability" or "Other Current Asset" allows us to make this process more streamlined.***

Taxes Collected

In most States and Provinces, Sales Tax is collected when selling either a Service or Product. QuickBooks will usually set up an account called "Tax Collected". This should be the only account that you will need.

You may notice that the Tax Collected account is an "Account Payable" account. You may recall that in all other cases where you could have used an "Accounts Payable" account, we said to use a different account type instead. Taxes collected are different because QuickBooks does many other things with this tax account to help you with remitting your Sales Tax. In order to help facilitate QuickBooks with this, Insight will use these accounts.

To allow Insight to post sales information into these tax accounts, you will have to set up at least one Sales Tax Item in QuickBooks. To set up a Sales Tax Item:

- Select Lists -> Item List from the menu

- If you already have “Sales Tax Item” set up in QuickBooks then skip the next two steps
- Click the Item button and select New
- From the Type dropdown select “Sales Tax Item”
- Enter a Name, Description, and Tax Rate for this item
- From the Tax Agency dropdown select to whom you remit your Sales Tax
- If your Tax Agency does not appear in the list
  - Choose <Add New>
  - Enter the information for your Tax Agency
  - Click the OK button
- Click the OK button

Optional Accounts

These accounts do not have to be set up for Insight to post to QuickBooks. Setting up these accounts allows Insight to help you track some additional information.

Returns and Refunds

QuickBooks Integration in Insight also allows you to specify an “Expense” account to record Service Refunds and Product Returns. These accounts will offset the sales figures to give you a net sales amount. Business will often want to do this so that they can track the amount of Refunds and Returns that they do.

Inventory

Some businesses do not want or need to track changes to the value of their inventory on a daily sales basis. Because of this, Insight has made the inventory accounts optional to set up. If they are not completely set up, Insight will not use any of them. These accounts all require each other to be set up to be used at all. Currently, QuickBooks Integration in Insight does not include Purchase Orders so we recommend that you use these accounts only if you currently enter your Purchase Orders into QuickBooks.

Inventory Value

The Inventory Value account records the total value of the inventory that you have on hand. Insight uses the “Average Cost” method of determining product costs and inventory value. This is important when you enter your purchase orders into QuickBooks so that the right amount is added to the value of your inventory. This account should be an “Other Asset” account. We highly recommend setting up two sub-accounts, one for Retail Products and another for Professional Products.

> ***NOTE: The Average Cost method takes the current value of a product and the value of new products and gets an average cost per item. For example, you have 5 bottles of shampoo that are worth 10.00 each and you buy 10 more, of the same kind, that are now worth 13.00 each. Insight would then adjust the cost for all of the bottles to 12.00 (10 * 13.00 + 5 * 10.00 = 180.00 total value. 180.00 / 15 = 12.00 per bottle).***

Cost of Goods Sold

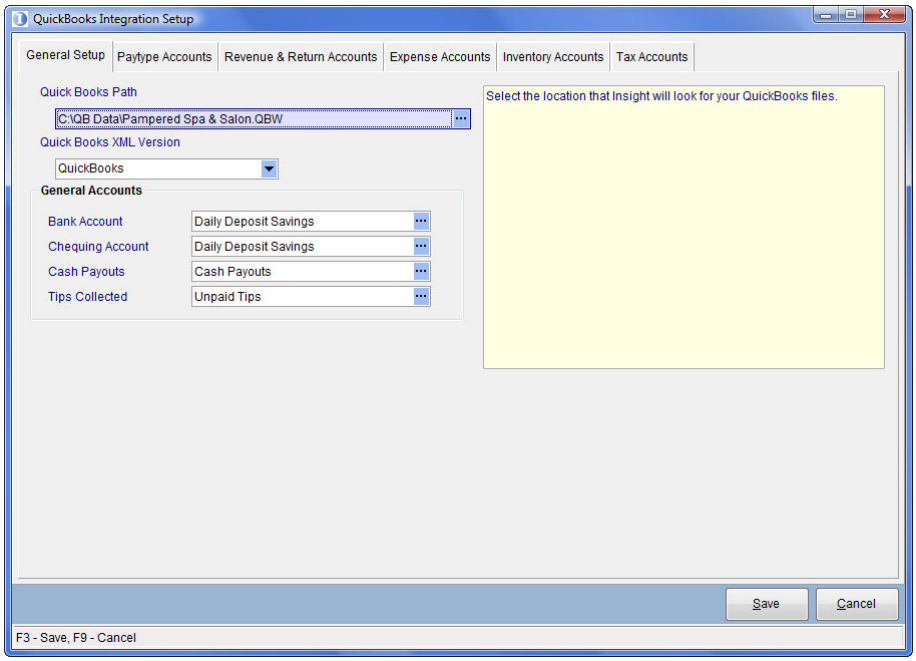
The Cost of Goods Sold account is used when products are sold, or used when performing a service, to balance off the decrease in value of your current inventory. It should be a “Cost of Goods Sold” type of account.

Shrinkage

The Shrinkage account is used when products are returned that are not resalable, or when the quantity of a product is manually changed to reflect a physical inventory count. This account should be an “Expense” account.

QuickBooks Integration Reference

General Setup tab



Quick Books Path

This field is where Insight will look for your QuickBooks files. You must select this field before you can do anything else in this area.

Quick Books XML Version

This field is used to specify that you are using QuickBooks Canadian Edition, especially an earlier version than 2008

Bank Account

This is the account to which Insight will record bank deposits and will most likely be the bank account to which you usually deposit at the end of the day.

Checking Account

This is the account from which Insight will record tips paid. This will most likely be the bank account from which you usually pay tips. This account will only be used if you pay tips using the Tips Payout Utility and select to pay out the tips with a check.

Cash Payouts

This is the account to which Insight will record Cash Payouts by default and will most likely be an Expense account. This account will be a default and can be changed at the time that records are posted to QuickBooks.

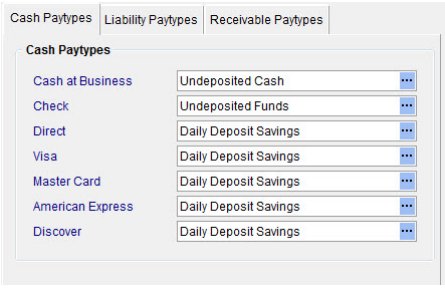
Tips Collected

This is the account to which Insight will record tips collected. This will most likely be a Liability (Other Current Liability) Account that will be used to show the balance of the tips not yet paid.

WARNING: Do not set this to an "Accounts Payable" account, as Insight will not be able to post to that account!

Paytype Accounts tab

Cash Paytypes tab



Cash at Business

This is the account to which Insight will record Cash collected. This will most likely be an account that you use to track the cash that you have at the business.

Check

This is the account to which Insight will record Check deposits. This will most likely be the bank account to which you usually deposit at the end of the day. If you do not deposit every day, then we highly recommend you select an "Undeposited Funds" account. Then, when you deposit your checks in the bank you would enter that transaction directly into QuickBooks. This is to help you keep your bank account balanced with what appears in QuickBooks.

Direct

This is the account to which Insight will record Direct deposits. This will most likely be the bank account to which your Direct Deposit provider deposits.

Visa

This is the account to which Insight will record Visa deposits. This will most likely be the bank account to which your Merchant Services provider deposits.

MasterCard

This is the account to which Insight will record MasterCard deposits. This will most likely be the bank account to which your Merchant Services provider deposits.

American Express

This is the account to which Insight will record American Express deposits. This will most likely be the bank account to which your Merchant Services provider deposits.

Discover

This is the account to which Insight will record Discover deposits. This will most likely be the bank account to which your Merchant Services provider deposits.

Liability Paytypes tab

WARNING: Do not set any of these accounts to an "Accounts Payable" account as Insight will not be able to post to that account!

Gift Certificate

This is the account to which Insight will record Gift Certificate transactions. This will most likely be a Liability (Other Current Liability) Account that will be used to show the balance of gift certificates not yet redeemed.

Series

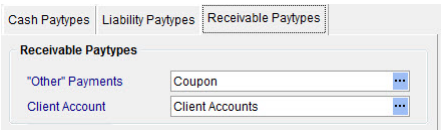
This is the account to which Insight will record Series transactions. This will most likely be a Liability (Other Current Liability) Account that will be used to show the balance of series usages not yet redeemed.

Tanning

This is the account to which Insight will record Tanning transactions. This will most likely be a Liability (Other Current Liability) Account that will be used to show the balance of tanning packages not yet redeemed.

Receivable Paytypes tab

WARNING: Do not set any of these accounts to an "Accounts Payable" account as Insight will not be able to post to that account!



"Other" Payments

This is the account to which Insight will record "Other" transactions. This will most likely be an Asset (Other Current Asset) Account. This account will be used to track payments that do not fall into the normal categories or paytypes. A certain amount of care should be used when selecting this account, and we encourage you to consult with your accountant.

Client Account

This is the account to which Insight will record client "On Account" transactions. This will most likely be an Asset (Other Current Asset) Account.

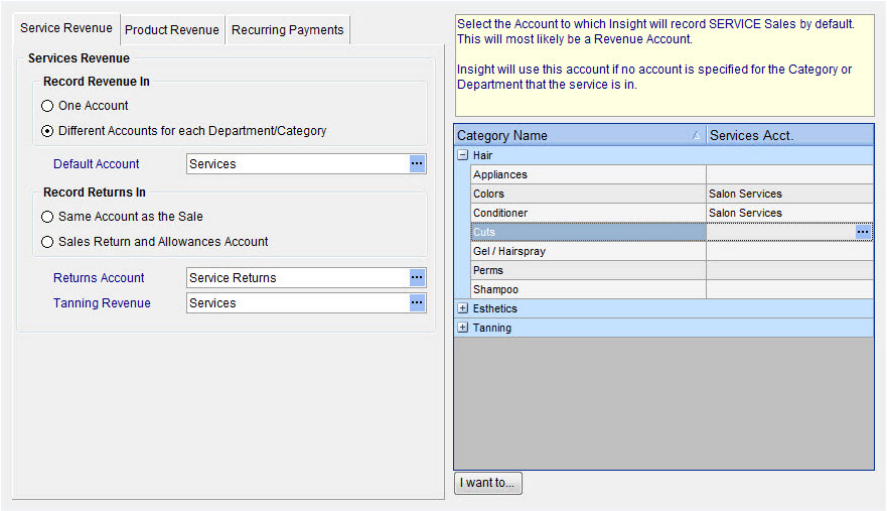
Employee Account

This is the account to which Insight will record employee "On Account" transactions. This will most likely be an Asset (Other Current Asset) Account.

Room Charges (with RoomMaster integration only)

This is the account to which Insight will record room charge transactions. This will most likely be an Asset (Other Current Asset) Account.

Revenue & Return Accounts tab



Services Revenue Tab

Record Revenue In

This group allows you to specify different QuickBooks accounts for each Department/Category.

Default Account

This is the account that your Service Revenue will be recorded except for those specified by department/category.

Record Returns In

This group allows you to specify a separate, contra-revenue account from QuickBooks to track your Service Sales Returns, or that service refunds come out of the same account that the Service Revenue was recorded in.

Returns Account

This is the account that Insight will use to record Service Sales Returns if that option is selected

Product Revenue Tab

Record Revenue In

This group allows you to specify different QuickBooks accounts for each Department/Category.

Revenue Account

This is the account that your Product Revenue will be recorded except for those specified by department/category.

Record Returns In

This group allows you to specify a separate, contra-revenue account from QuickBooks to track your Product Returns, or that Product Returns come out of the same account that the Product Revenue was recorded in.

Returns Account

This is the account that Insight will use to record Service Sales Returns if that option is selected

Recurring Payments Tab

Recurring Payments Account

This is the account that your Recurring Payment revenue will be recorded.

Department/Category Grid

This grid allows you to specify a certain revenue account for each individual category if you wish. This will only be visible if you have selected the Different Accounts for each Department/Category option for either services or products.

I want to… button

Clear Current Category

This option will remove the account from the selected category.

Copy to all Categories in this Department

This option will copy the account from the selected category to all categories within the same department.

Expense Accounts tab

Coupons

This is the account to which Insight will record Coupon payments. This will most likely be an Expense Account. The purpose of this account is to track how much your business is "spending" on coupon redemptions and is used to offset the difference between the value of the Service/Product and the amount actually collected from the client when using a coupon.

Promotions

This is the account to which Insight will record promotional Gift Certificates. This will most likely be an Expense Account. The purpose of this account is to track the amount that gift certificates have been "discounted" and is used to offset the increased amount payable.

Discounts

This is the account to which Insight will record discounted items. This will most likely be an Expense Account. The purpose of this account is to track how much your business is "spending" on discounts and is used to offset the difference between the value of the Service/Product and the amount actually collected from the client when given a discount.

Over/Unders

This is the account to which Insight will record over/under amounts. This will most likely be an expense account that will be used to balance your expected revenue from sales and the amount that you actually count at the end of each day.

Inventory Accounts tab

Track Inventory Value in QB

This field is used to indicate whether or not you are using QuickBooks to track your inventory value. If you are, you need to check this field and select the following accounts, otherwise you can skip this tab.

Retail Inventory

This is the account to which Insight will record changes to the value of your retail inventory On Hand quantity. This will most likely be an Asset Account. This account will only be used if you also specify a Cost of Goods Sold (COGS) account and is used to deduct value from your inventory when it is sold.

Prof. Prod Inventory

This is the account to which Insight will record changes to the value of your professional product inventory On Hand quantity. This will most likely be an Asset Account. This account will only be used if you also specify a Cost of Goods Sold (COGS) account and is used to deduct value from your inventory when it is sold.

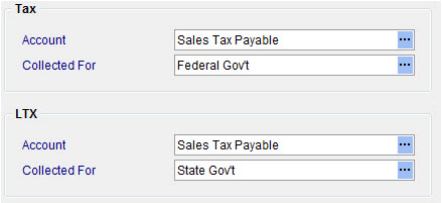
Cost of Goods Sold

This is the account to which Insight will record changes to the value of your cost of goods sold. This will most likely be an Expense Account. This account will only be used if you also specify either a Retail Inventory or a Professional Product Inventory account and is used to balance the deducted value from your inventory when items are used or sold.

Shrinkage

This is the account to which Insight will record returned products which are not resalable. This will most likely be an Expense Account. This account is used to balance the deducted value from your sales when a product is returned. If you do not specify a Retail Inventory account, all returned products will be put into this account. If a Retail Inventory account is specified, only the non-sellable returns will be placed in this account.

Tax Accounts tab



Tax1

Account

This is the account to which Insight will record sales Tax (GST in Canada and Australia) collected on behalf of the government.

Collected For

This is the Tax Agency for which the tax is collected.

Tax2

Account

This is the account to which Insight will record a second sales Tax (LTX in USA, PST in Canada) collected on behalf of the government.

Collected For

This is the Tax Agency for which the tax is collected.

Function Buttons

The function buttons in the bottom right section of the screen allow you to perform the most common tasks for this screen. Most of the function buttons have an F-key associated with them that you can press on your keyboard instead of clicking the button with your mouse.

Edit (F7)

Clicking this button will go into edit mode so that you may edit the QuickBooks setup.

Exit (F3)

Clicking this button will close the QuickBooks Integration Setup screen.

Save (F3) (when in edit mode)

Clicking this button will save your changes and return to browse mode.

Cancel (F9) (when in edit mode)

Clicking this button will cancel your changes and return to browse mode.

Email Templates

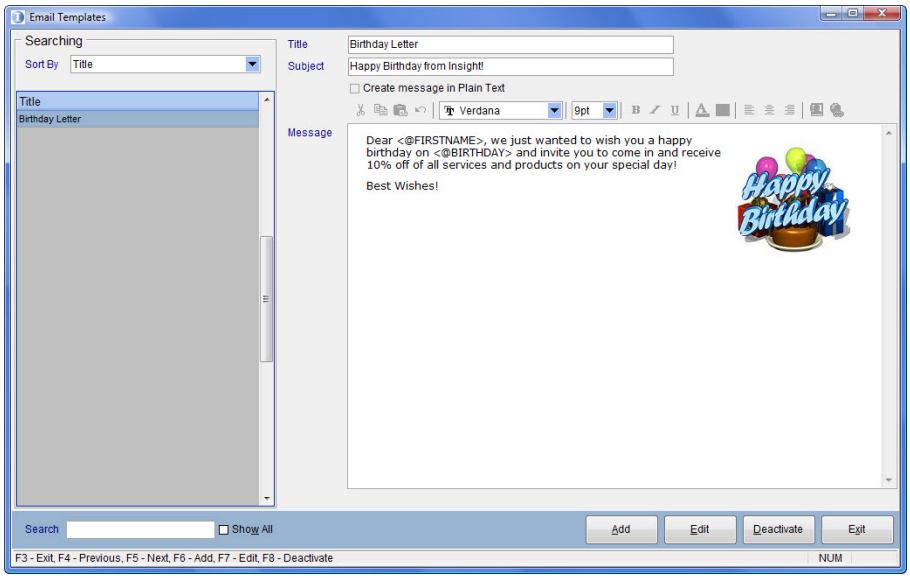
The Email Templates section allows you to set up generic emails that you can use to send to your clients more than once without having to type all of the information in every time. Some examples are emails to recognize a client's birth date, anniversary, or to inform them of their account balance.

How to Add a New Email Template

- Click on the Setup button on the Insight Menu Bar
- Click on Email Templates in the menu
- Click the Add button or press F6 on your keyboard
- Enter a Title for this email

> ***NOTE: The Title will only ever be seen in the Insight program, not by your clients. It is for you to recognize when you are selecting an email template from a list.***

- Enter the Subject line for the email that your clients will see when they receive the message



- Enter the Message text for the email
- You can use the font controls in the tool bar at the top to change the font, size, color, and formatting of the text
- Pictures can be inserted by clicking the head icon second from the right on the tool bar
- Internet links can be inserted by clicking the link icon at the top right of the tool bar
- Non-picture attachments can be inserted by clicking Actions, then Add Attachment
- To have client-specific information inserted into the email when it is sent, perform the following indented steps
  - Position the cursor (flashing line) in the text where you want the client information to be inserted
  - Click the Insert button
  - Select the information type that you want to insert from the menu

    NOTE: You will see text inserted into the email beginning with '<@' and ending with '>'. When the email is actually sent, the information corresponding to that text will be retrieved from each client's record and inserted into the email. This allows you to set up a generic email that appears personalized to the client when they receive it.

  - Continue with the rest of the email and repeat these steps for each different piece of information you want inserted
- Click the Save button or press F3 on your keyboard

TIP: We HIGHLY recommend testing your emails before sending them out in large batches by sending them to only one client, such as your own name entered into the client screen. This will ensure that the emails look the way you expect when they are received by your clients.

Email Templates Reference

Active Lookup

The Active Lookup area in the left area of the screen is where you can search to find the email template you wish to work with. Please refer to the "Active Lookups" section on page 1 to learn how this feature is designed to be used.

Title

The title is just a basic description of the email for your use in Insight. The clients the email is sent to will never see the Title, only the Subject.

Subject

The Subject line is intended to be a brief summary of the email so that your clients can recognize it in their inbox and realize that it is not spam.

Create message in Plain Text checkbox

Clicking this box will remove all font and picture information from the email. Use this if you are sending an email to clients that you know cannot receive emails in html format.

Tool Bar

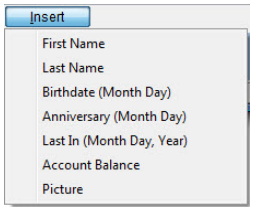
This bar contains all of the font controls that allow you to change the font, size, color, and formatting of the text, as well as adding pictures and internet links.

Message

This is where you can type in the full text of your email.

Insert button

The options on this button allow you to insert data placeholders into the email. What this means is that when the email is actually sent, personalized information from your clients' file will be inserted in place of what you see here. For example, if you click the Insert button and select First Name from the menu, "<@FIRSTNAME>" will be inserted into the email. When the email is sent, each client's actual first name will be inserted into the email, making it seem much more personal to each client when they receive it, and much less like at mass-produced form letter. The options available are listed below.



First Name

This will insert the client's first name into the email when it is sent.

Last Name

This will insert the client's last name into the email when it is sent.

Birthdate (Month Day)

This will insert the month and day of the client's birth date into the email when it is sent, i.e. June 23.

Anniversary (Month Day)

This will insert the month and day of the client's anniversary into the email when it is sent, i.e. June 23.

Last In (Month Day, Year)

This will insert the month, day, and year of the client's last visit date into the email when it is sent, i.e. June 23, 2007.

Account Balance

This will insert the client's current account balance into the email when it is sent, i.e. $150.00.

Picture

This will allow you to select a picture to insert into the email. The picture must exist on your computer somewhere and be in either bitmap (.bmp) or jpeg (.jpg) format.

Actions Button

Add Attachment

Use this function to add an attachment to your email that is not a picture. This can be a document or data file such as a PDF file or a ZIP file for example, and must exist somewhere on your computer.

Remove Attachment

Use this function to remove the selected attachment from your email.

Remove All Attachments

This will remove all attachments from your email.

Function Buttons

The function buttons in the bottom right section of the screen allow you to perform the most common tasks for this screen. Most of the function buttons have an F-key associated with them that you can press on your keyboard instead of clicking the button with your mouse.

Previous (F4)

There is no button associated with this function key. Pressing F4 on your keyboard will select the email template that is above the one that you are currently on.

Next (F5)

There is no button associated with this function key. Pressing F5 on your keyboard will select the email template that is below the one that you are currently on.

Add (F6)

Clicking this button will go into add mode to allow you to add a new email template.

Edit (F7)

Clicking this button will go into edit mode so that you may edit the selected email template.

Deactivate (F8)

Clicking this button will mark the currently selected email template as deactivated. It will disappear from the Active Lookup unless you have Show All checked, in which case it will appear in red.

Exit (F3)

Clicking this button will close the Email Templates screen.

Save (F3) (when in add or edit mode)

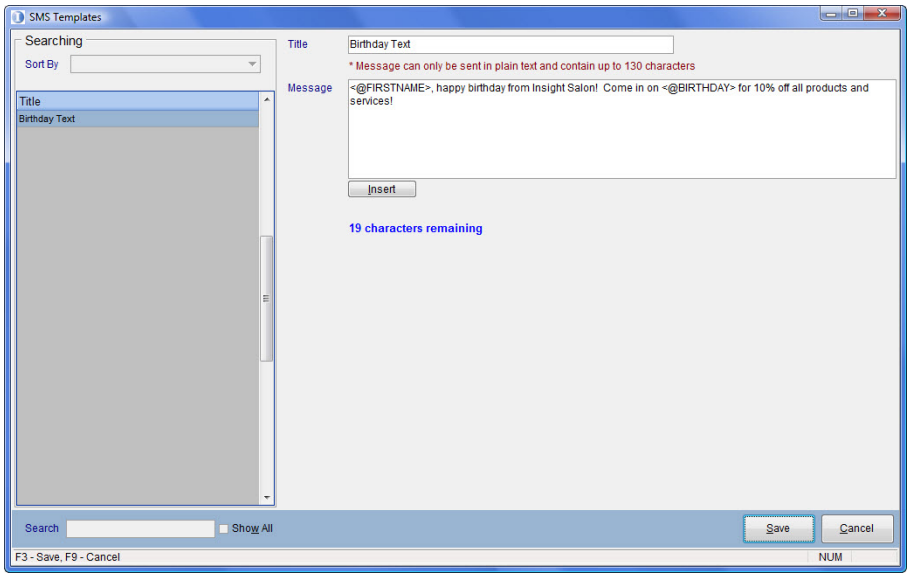
Clicking this button will save your changes and return to browse mode.

Cancel (F9) (when in add or edit mode)

Clicking this button will cancel your changes and return to browse mode.

SMS Templates

The SMS Templates section allows you to set up generic SMS text messages that you can use to send to your clients more than once without having to type all of the information in every time. Some examples are messages to recognize a client's birth date, anniversary, or to inform them of their account balance.



How to Add a New SMS Template

- Click on the Setup button on the Insight Menu Bar
- Click on SMS Templates in the menu
- Click the Add button or press F6 on your keyboard
- Enter a Title for this message

> ***NOTE: The Title will only ever be seen in the Insight program, not by your clients. It is for you to recognize when you are selecting an SMS template from a list.***

- Enter the Message text for the SMS message

NOTE: As you type you will see a count of the number of characters you have entered. A standard text message may only be up to 130 characters. If you enter more than that, the message may be rejected, cut off, or split into two messages, which will cost you more.

- To have client-specific information inserted into the message when it is sent, perform the following indented steps
  - Position the cursor (flashing line) in the text where you want the client information to be inserted
  - Click the Insert button
  - Select the information type that you want to insert from the menu

    NOTE: You will see text inserted into the message beginning with '<@' and ending with '>'. When the message is actually sent, the information corresponding to that text will be retrieved from each client's record and inserted into the message. This allows you to set up generic messages that appear personalized to clients when they are received.

  - Continue with the rest of the message and repeat these steps for each different piece of information you want inserted
- Click the Save button or press F3 on your keyboard

TIP: We HIGHLY recommend testing your messages before sending them out in large batches by sending them to only one client, such as your own name entered into the client screen. This will ensure that the messages look the way you expect when your clients receive them.

SMS Templates Reference

Active Lookup

The Active Lookup area in the left area of the screen is where you can search to find the SMS template you wish to work with. Please refer to the "Active Lookups" section on page 1 to learn how this feature is designed to be used.

Title

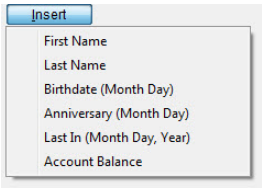
The title is just a basic description of the email for your use in Insight. The clients the email is sent to will never see the Title, only the Subject.

Message

This is where you can type in the full text of your SMS message.

Insert button

The options on this button allow you to insert data placeholders into the message. What this means is that when the message is actually sent, personalized information from your clients' file will be inserted in place of what you see here. For example, if you click the Insert button and select First Name from the menu, "<@FIRSTNAME>" will be inserted into the message. When the message is sent, each client's actual first name will be inserted into the message, making it seem much more personal to each client when they receive it. The options available are listed below.



First Name

This will insert the client's first name into the message when it is sent.

Last Name

This will insert the client's last name into the message when it is sent.

Birthdate (Month Day)

This will insert the month and day of the client's birth date into the message when it is sent, i.e. June 23.

Anniversary (Month Day)

This will insert the month and day of the client's anniversary into the message when it is sent, i.e. June 23.

Last In (Month Day, Year)

This will insert the month, day, and year of the client's last visit date into the message when it is sent, i.e. June 23, 2007.

Account Balance

This will insert the client's current account balance into the message when it is sent, i.e. $150.00.

Function Buttons

The function buttons in the bottom right section of the screen allow you to perform the most common tasks for this screen. Most of the function buttons have an F-key associated with them that you can press on your keyboard instead of clicking the button with your mouse.

Previous (F4)

There is no button associated with this function key. Pressing F4 on your keyboard will select the SMS template that is above the one that you are currently on.

Next (F5)

There is no button associated with this function key. Pressing F5 on your keyboard will select the SMS template that is below the one that you are currently on.

Add (F6)

Clicking this button will go into add mode to allow you to add a new SMS template.

Edit (F7)

Clicking this button will go into edit mode so that you may edit the selected SMS template.

Deactivate (F8)

Clicking this button will mark the currently selected SMS template as deactivated. It will disappear from the Active Lookup unless you have Show All checked, in which case it will appear in red.

Exit (F3)

Clicking this button will close the SMS Templates screen.

Save (F3) (when in add or edit mode)

Clicking this button will save your changes and return to browse mode.

Cancel (F9) (when in add or edit mode)

Clicking this button will cancel your changes and return to browse mode.

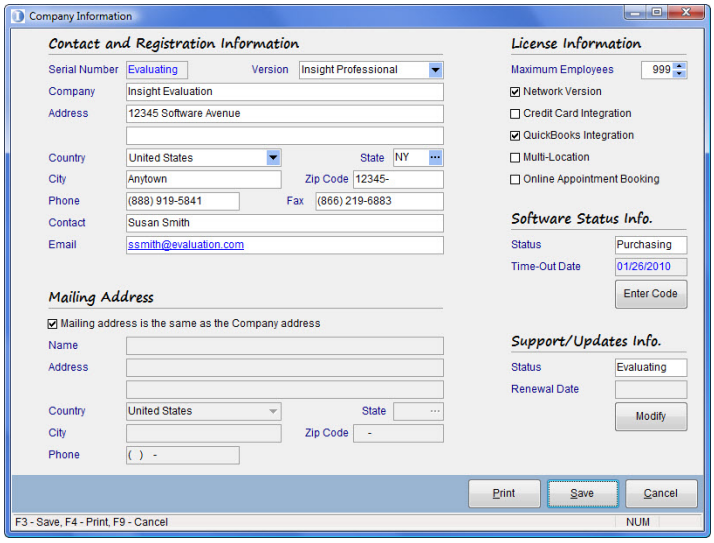
Company Information

The Company Information screen contains all the licensing information for your copy of Insight. This information must be filled out, printed and faxed to us in order for us to license your copy of Insight.

- Click on the Setup button on the Insight Menu Bar
- Click on Company Information in the menu
- Fill in the Company and all of the address related fields accurately including the phone numbers, Contact and Email
- Uncheck Mailing address is the same as the Company address if you want courier and mail correspondence to go to a different address other than the main business address and then fill in all of the mailing address fields
- Verify that all of the information is correct and then click the Save button or press F3 on your keyboard

TIP: It is vitally important that you take the time to make sure that these fields are filled out EXACTLY the way you want them to be printed on your receipts. If you use ALL CAPITAL LETTERS it will print on your receipts that way. If you put the name of your business as "sandras salon/spa" it will print on your receipts that way. Please make sure that you use proper capitalization and spacing ("Sandra's Salon & Spa") and verify that all of the information is 100% correct BEFORE you click on the Save button.

Company Information Reference



Serial Number

This is the unique serial number for your copy of the Insight software. This number will be filled in automatically after you have purchased Insight and received your confirmation code.

Version

This is the type of the Insight software you have purchased. Currently, only two different versions are available, Insight Standard, and Insight Professional. If you have Insight Standard and are interested in upgrading to Insight Professional, please contact the sales representative through whom you purchased Insight, or call Syntec at 1-800-805-4532 ext. 2.

Address and Contact Information

The main area of this screen is for you to enter in the name, address and phone numbers of your business as you would like to see them printed on the receipts that you give to your clients. The Contact and Email fields are so that Insight representatives know who to contact regarding any issues you may have.

Mailing address is the same as the Company address

You can uncheck this field if you want to specify a different address for correspondence from Syntec to be sent to. This can be useful if the business is not actually open yet or if the business owner has a separate address that they want mail or products to be sent to.

License Information

This section of the screen shows which options have been purchased with the Insight software.

Max. Employees

This is the maximum number of employees that you can have at a Charge Level of 1 (one) or higher. This means anyone who needs to appear on the appointment book, including tanning beds/booths, and anyone who can receive credit for selling products or services.

Network Version

This option specifies that you have more than one computer connected together and able to run Insight at the same time.

Credit Card Integration

This option is for the automatic processing of credit cards directly through the Insight software.

QuickBooks Integration

This option is for the ability to have Insight post sales and other related information directly into your copy of the QuickBooks accounting software.

Multi-Location

This option is for the ability to have more than one copy of Insight linked together to share information such as clients, gift certificates and inventory.

Online Appointment Booking

Enabled

If you have purchased the Online Appointment Booking module, this field will be checked automatically.

Renewal Date

This shows the monthly renewal date for your Online Appointment Booking module.

Software Status Info.

This section of the screen shows the status of your copy of Insight, which can change depending on various factors. The different states are described below.

Status

This field indicates the current state of your copy of Insight. Before you have purchased Insight, this field will say "Evaluating". After clicking on the Purchase button, it will change to "Purchasing". Once you have received your purchase confirmation code, it will change to "Active", which is the normal state that it should be in. If you modify anything on this screen, it will change to "Modifying", and you will need a modification confirmation code before it will return to "Active".

Time-Out Date

This field indicates the date on which you will no longer be able to enter information into Insight if you are in a Purchasing or Modifying status. If there is a date showing in this field and the Status is anything other than "Active" you need to contact Insight technical support as soon as possible to prevent this from happening.

Purchase/Enter Code button

This button can be used to begin the licensing process once you have decided to purchase Insight. It is also used to enter the confirmation code you will need once you have purchased or modified your company information in any way.

Support/Updates Info.

This section of the screen shows the support and update status of your copy of Insight, which can change depending on various factors. The different states are described below.

Status

This field indicates the current support and update state of your copy of Insight. Normally, this field will say "Active". If your annual Renewal Date has passed and you have not yet received your support confirmation code, it will change to "Overdue". If you ever choose not to continue with a support and update contract with Syntec, you will receive a support end code and the status will change to "Expired". After that time, if you ever need technical support for Insight, you will be charged on a "per incident" basis.

Annual Amount

This is the amount of your support and update contract fee, which is paid on an annual basis to allow you access to download updates and receive toll-free (in the US and Canada) technical support.

Renewal Date

This is your annual support renewal date, normally the anniversary of the date you purchased Insight.

Modify button

This button is used to enter the confirmation code you will need once you have paid for your annual support contract each year.

Function Buttons

The function buttons in the bottom right section of the screen allow you to perform the most common tasks for this screen. Most of the function buttons have an F-key associated with them that you can press on your keyboard instead of clicking the button with your mouse.

Print (F4)

This button appears when you have clicked the Purchase button or modified any of the information on this screen. It will print the Purchase or Modification report, which you need to fax to us using one of the two numbers printed on the report. This will begin the process of getting you the confirmation code that you need in order to continue using the Insight software without interruption.

Save (F3)

Clicking this button will save your changes and close the Company Information screen. If you have made any changes, you will receive a message informing you that you will need to obtain a confirmation code within fifteen days. If you do not contact us for this code before this time is up, you will not be able to enter any new information into Insight until the

code is received. We feel that fifteen days is plenty of time to allow for this, and apologize for any inconvenience, but this is both for our protection and to ensure that your company information is always current in our files.

Cancel (F9)

Clicking this button will cancel your changes and close the Company Information screen.

Menu Bar Properties

The Menu Bar Properties screen contains a number of options you can set to control how the top menu bar on your copy of Insight looks. By default, the bar sticks to the top of your screen and cannot be moved. This is called Docking and is one of the options you can change. You can also have it scale to match your screen size if you are using a high resolution on your monitor.

- Click on the Setup button on the Insight Menu Bar
- Click on Menu Bar Properties in the menu
- Click the "Scale Buttons on Larger Screens" option to have the menu scale to match your screen size if you are using a high resolution on your monitor
- Click "Auto Hide Between Uses" to have the menu bar slide off of the screen except for a tiny bar that will come back when you move your mouse over top of it (recommended for advanced Windows users only)
- Select the Docking option that you prefer

> ***NOTE: By default, Insight is Docked to Top. In this mode, the menu bar cannot be moved, and prevents other applications from running over top of the menu area. If you choose Not Docked, the menu bar can be moved around on the screen and can be covered up by other applications.***

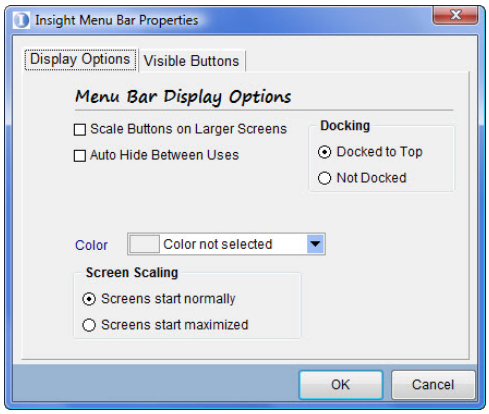
- Click the arrow button on the Color field to change the background color of the menu bar
- Click the Visible Buttons tab
- Click to uncheck any of the buttons that you do not wish to see on the menu bar

> ***NOTE: Any buttons that do not have a checkmark next to them will not appear on the menu bar. They will still be accessible from within the More button's menu however.***

- You can also use the up and down arrow buttons in the middle of this screen to change the order of the buttons on the menu bar
- When you are finished, click the OK button

Menu Bar Properties Reference

Display Options tab



Scale Buttons on Larger Screens

If your computer is running at a screen resolution greater than 1024 x 768, checking this option will cause the Insight Menu Bar to expand to take up the same amount of room on your screen as it would if you were running at a lower resolution. This can make it easier to read. If you would prefer to have more information displayed as opposed to larger text and buttons, then uncheck this option.

Auto Hide Between Uses

This option is designed for advanced Windows users only. It will cause the Insight Menu Bar to slide up out of the way of your screen, leaving only a tiny bar visible across the top. When you move your mouse pointer up into that area, then the menu bar will slide down again, becoming fully visible. This option is only available if Insight's Docking option is set to "Docked to Top".

Docking

This option controls how the Insight Menu bar sits on your screen. When it is "Docked to Top", Insight will automatically move any other windows down out of its way so that the menu bar is not covered up by any other applications when it is running. This makes it easy to get back to without having to click down on the Windows task bar to find it. If it is set to "Not Docked", other applications can run over top of the menu bar, and you also have the ability to move the menu bar around on your screen.

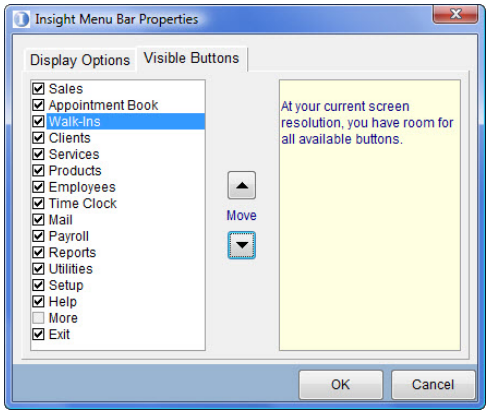
Color

This option controls the background color of the Insight Menu Bar. You can set this to any color in the list that you wish.

Screen Scaling

If your display is set to a resolution higher than 1024 x 768, you can have the main Insight screens automatically maximize when they start up to utilize all of the display area on your monitor. This option is only available if you have the "Docked to Top" option selected for the Docking group.

Visible Buttons tab



Button list

The list on the left contains each Insight Menu Bar menu item that can be displayed as a button. You can hide or unhide whichever buttons you wish by clicking the checkbox for each one. The only one you cannot change manually is the More button, which appears automatically if you uncheck any of the other buttons. All unchecked buttons will then appear in a menu available from the More button. Depending on your screen resolution, some buttons may be hidden already. The help window on the right will tell you how many buttons can be displayed at your current screen resolution.

Move buttons

Clicking the up or down arrow buttons in the center of the screen will move the currently selected button in the list. This allows you to change the order that the buttons appear on the menu.

OK button

Click this button to save your changes to the Insight Menu Bar and close the screen.

Cancel button

Click this button to cancel your changes to the Insight Menu Bar properties and close the screen.

16. Help

The Help screen contains information about your copy of Insight as well as support contacts and links to the digital versions of the manuals. Your current version number is displayed in the top middle of the screen next to the "What's New?" button. Click this button to read a document listing all the changes that have been made to Insight. Beneath this are the telephone numbers and email addresses that you may use to contact us for support or sales assistance. The bottom section lists your company information and serial number. The buttons on the bottom are available to view the Quick Setup Guide or User's Manual (this document). You can also click the Barcode Scanner Config. button in order to print out the configuration sheets for your barcode scanner. Click the OK button to close this screen.

17. Exit

Click the Exit button to close Insight. If you have any screens open, Insight will try to close them before exiting. If it is unable to do so, you may have to manually close the screens that remain open, or save or cancel your work on those screens, as a screen cannot be closed if it is in add or edit mode.